Working with Portfolios

Ticker List Overview

Research Wizard allows you to select and save group of tickers as a portfolio, called a Ticker List. A Ticker List is a text (tab-delimited) file that contains a column of ticker symbols. Research Wizard has a sample Ticker List - myportf.txt.

Creating Ticker Lists

Research Wizard works with special portfolio file called a Ticker List. A Ticker List is a text (tab-delimited) file with one column of data – companies' tickers.

There are several ways you can create a Ticker List. You can save the companies that passed your screening criteria or you can manually enter the ticker symbols to the Ticker List.

To manually create a Ticker List, follow these steps:

1. From the **Portfolio** menu, select the Enter New Ticker List command or click the **New Ticker List** button. The *Ticker List* dialog box will appear.
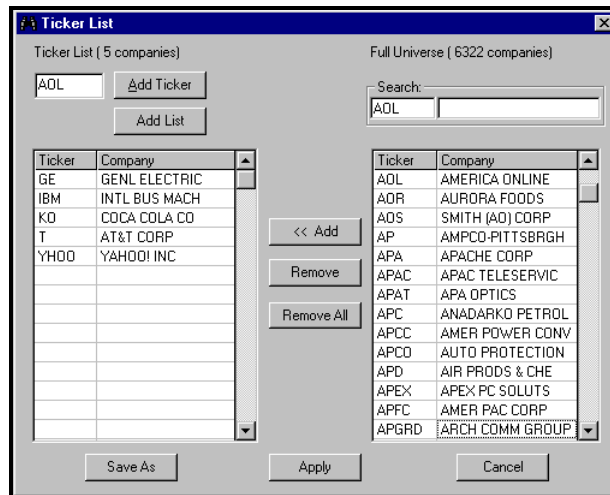
Ticker List dialog box.

2. In the Ticker box, type a ticker symbol.

3. Click **Add Ticker** or press **Enter**.

4. To view the list of all available companies, use the scroll bar to browse the Full Universe selection. Select a company from the list and click **<< Add**.

5. After all of your tickers have been entered, click **Save As** and then **Apply** to make the newly created Ticker List active.

Selecting Ticker Lists

To select a Ticker List, follow these steps:

1. From the **Portfolio** menu, select the Open Ticker List command or click the **Open Ticker List** button. The *Ticker List* dialog box will appear.

2. In the **Look in** box, click the drive and folder that contains the Ticker List.

3. In the folder list, double-click folders until you open the folder that contains the Ticker List you want. Double-click the Ticker List you want to open.

Editing Ticker List

Removing Tickers From Ticker List

To remove tickers from the list, follow these steps:

1. Open the Ticker List and then select the View/Edit Active Tickers command from the **Portfolio** menu, or click the **View/Edit Ticker List** button.

2. At the *Ticker List* dialog box, highlight a ticker on the Ticker List and click **Remove**.

3. To delete all ticker from the list, click **Remove All**.

Adding Tickers to Existing Ticker List

To add tickers to the existing Ticker List, follow these steps:

1. From the **Portfolio** menu, select the View/Edit Active Tickers command, or click the **View/Edit Ticker List** button.

2. At the *Ticker List* dialog, proceed with adding tickers to the list by entering them in the Ticker box.

3. After all of the tickers have been entered, click **Save**.

Combining Several Ticker Lists

To combine several Ticker Lists, follow these steps:

1. Open the first Ticker List and then select the View/Edit Active Tickers command from the **Portfolio** menu, or click the **View/Edit Ticker List** button. The *Ticker List* dialog box appears.

2. Click the **Add List** button.

3. In the **Look in** box, click the drive and folder that contains the Ticker List you want to add.

4. In the folder list, double-click the folders until you open the folder that contains the Ticker List you want.

5. Double-click the Ticker List you want to add.

6. The ticker lists will be combined.