Outline for Advanced Charting Webinar

**Overview of the Chart**

* Reading the legend
* Changing the period
* Zooming in

**Adding to the Chart**

* Linking (with chain link icons at the top of the chart)
* Right-clicking from the Table or Navigation panel
* Type into chart’s Research Box
* Use ‘Benchmarks’ menu

**Primary Ticker (leftmost ticker in chart’s Research Box)**

* Linking only replaces the primary ticker
  + Useful with scrolling through the Table
* Benchmarks’ sector and industry reflect those of the primary ticker
* Technicals only apply to the primary ticker

**Removing Lines from the Chart**

* ‘x’ out in Research Box (or in the legend if it’s a dependent)
* Chart history with drop-down arrow

**Relative Performance/Setting a Baseline**

* When two or more tickers are charted, click the graph icon to the right of the ticker symbol in legend

**Dividend-Adjusted Price**

* Add re-invest dividends through the ‘Settings’ menu, or by clicking the graph icon next to “Price” in the legend

**Settings**

* Switch between dollars, percent change, logarithmic, and candlesticks

**Charting Portfolios, Watchlists, and Screeners**

* Portfolios are weighted on quantity
* Watchlists are equal-weighted
* Screeners are not backtested
  + Set these against a benchmark

**Events menu**

* Chart earnings, splits, dividends, the max-drawdown, and portfolio activity

**Technicals**

* Chart simple moving average (SMA), exponential moving average (EMA), Bollinger Bands, Moving Average Convergence Divergence (MACD), Relative Strength Index (RSI), Money Flow Index (MFI), Volume, Volume by Price

**Fundamentals**

* Chart over 100 fundamentals below the main chart (Note that Basic users can chart 6 fundamentals only)
* Edit the Favorites list
* Chart several fundamentals at once with a Metric Package
* Modify your Metric Packages

**Shortcuts *(Premium feature)***

* Save the current chart configuration as a shortcut to return to it later