

TRANSCRIPT

Setting up Active Trader Pro®

Presenters: Matt Davison and Peter Janssen

Matt Davison: All right. Welcome, everybody. My name is Matt Davison, I'm here with the Trading Strategy Desk, and joining me today is Peter Janssen. And we're here to demonstrate the powers and tools of Active Trader Pro. So this is a software that we offer for free to our Fidelity clients, and it's usually going to be used by people that are trading a little bit more actively but if you're wanting to just monitor your accounts, check out what's going on there, just have a more active approach to seeing what's going on in the market may be also helpful for you.

That being said, we're going to start off here on fidelity.com, and the reason we're starting off here is because this is where we need to be in order to gain access to the platform. What we'll do over on the left-hand side, we'll click on Accounts and Trade. Once we scroll down just a little bit here, you should be seeing the Active Trader Pro name. If we'll click on that, that'll take you to the following page, and it's as easy as clicking this blue button that says Get Active Trader Pro.

So if you click on that, it'll give you a pop-up window, as you'll see here on the left-hand side if you have a PC you're going to want to choose Download Now over there. If you have the Mac, you're going to want to choose that option. Once you click on that, it should launch an installer where you can open it, run it, and that will get the platform on your computer.

That being said, just to talk about one other brief thing here, system requirements, if you're wanting to check those out and see if your computer is at a level that's going to be optimal for running the platform, you can come down to the bottom of the page here, click on this and view what is necessary in order to run the platform at its best possible capabilities.

Once you have that done, what it will do is it'll actually put an icon on the backdrop of your screen. This is where you'll go in there, you'll double-click on that to launch the program. You don't actually need to be logged in to fidelity.com in order to be able to launch the program, and once you do, it'll bring up the Active Trader Pro window, the login screen and it'll have a place for you to enter the username and password.

Now the username and password is going to be the exact same as if you were logging into fidelity.com, so you don't need to create a new one, and further, it's going to automatically pull your information into Active Trader Pro, so any accounts that you're authorized on or own will automatically feed into Active Trader Pro. So no need to link the two, it does that automatically.

That being said, once you get the platform, what are some of the reasons that we may want to use this? I've mentioned a couple here at the beginning of the presentation. One of the most common reasons is if you're an actual active trader and you need to trade quickly, you're getting in and out of positions, it's going to be really helpful using Active Trader Pro for a couple of reasons. First of all, you can customize your screen to have it be viewed however you want to see it. So if you want a trade ticket, a chart, a quote window, you can have all those things up simultaneously, whereas sometimes on the website it requires filtering from one page to the next, redownloading the information,

and it just takes a little bit of extra time. Whereas in Active Trader Pro you can have them all up simultaneously.

Secondly, the information in Active Trader Pro is available to be streamed. So what does this mean? Well, if you were logging in right at 9:30 or looking at the market right at 4 PM Eastern Time, if you had a quote box up on something that's pretty liquid and actively traded, you'd see how quickly the market is moving, it would be actually difficult probably to actually see all the trades going off because it's moving so fast. But obviously, intraday that's going to be the quickest available way of getting the information, pricing data, et cetera. So that's the first thing.

The second thing is obviously monitoring the portfolio. So as I mentioned, all of your accounts are going to feed in to Active Trader Pro, so you can look at your watch list, your positions window, you can look at your charts, and filter through that and have a really close look at what's going on in your accounts. So that's some of the main reasons. The other ones we'll get through throughout the four trading sessions or training sessions I should say that we're having here for this course. In week one or session one I should say, we're going to be talking about why ATP, downloading the platform, the layouts, positions, and quotes, are going to be the remaining three things for this week that we're going to focus on.

In session two we're going to be looking at trading. So all the different types of trade tickets and things that we can do with that. Session three we're going to be looking at the charts. And then session four our options tools and capabilities that we have through Active Trader Pro. So those are the four

sessions that we have for you. And that is what we're going to be demonstrating for the rest of the time here.

That being said, once you get logged into Active Trader Pro, when you initially download the platform, now, of course, we use this every day, so it's not going to look exactly like this for you all, but what you should be seeing is if we come up to Active Trader Pro set-up, a pop-up window that looks something like this. So this is when you initially first download it, this is kind of the page that you'll begin to see.

And first of all, it will give you some options. So we do have some prebuilt or already made layouts in the platform and you can cycle through and see all these different layouts, and basically go through there and see if there's any particular one that we've already prebuilt that you might be interested in. If you don't want to use one of those, and if you don't use it right away, it does still save it, I'll show that here in just a minute. But you can go in there and create a custom layout.

So if you click on Custom Layout it will take you to this page right here. And what this will do for you is it's going to show you all of the different tools and windows that we have available through Active Trader Pro. So as you'll notice here, we have positions, I'm going to go ahead and add that one, going to add a quote, I'll add a chart.

And you'll see as I'm clicking all these things it's starting to layer the different windows here on the screen behind me. And you can scroll through, you'll see a number of different things. There's some of the options-related things here, the balances as we continue to go throughout, but I'll keep it simple for the

point of this presentation, but feel free to add as much as you want. Just remember, , at some point you're going to have to arrange this in a way that it's all going to fit on the screen, but I'll leave it at those three items and I'll click Next.

Now you'll notice for the point of this presentation, we have it on the higher font. The thing is if we start to move this down, what you'll notice is it's creating a lot more negative space on my actual platform. So obviously, there's no right or wrong way to do this, it's a personal preference thing, whatever is the easiest for you to view and see. We keep it on the higher setting just for the purposes of presentation so everybody can see what we're doing.

You can also choose your color theme from this page. And I'll show you again just because you select one thing right now doesn't mean after the fact that we can't go back and change it. But we keep it on white simply because we've been told that's the easiest for everybody viewing at home to see. But we also have blue, and personally, when I'm using it on my individual machine, I like to keep it on black, this is what that looks like. But again I'll switch it back to the white here just for the remainder of this presentation.

You can also select your default accounts. So you can select the account for trading, so anytime you pull up a trading ticket it'll have that default account. You can also say no default account, which is probably going to be the most helpful if, in fact, you trade in multiple accounts, that way you have to go in there and select and make sure that you're choosing the account that you want to be working with each and every time. And then you can also select a primary account for any of the other tools. For us, we only have the one test account here. So we'll leave it just like that.

As we go through Next, a couple of videos will pop up, hopefully, this is going to serve as kind of a replacement for a lot of these. But we also have these to view if you want to see a specific tool that's in use and how to navigate or use it. You can certainly go through and look at some of those, as well as going in there and realizing that you can customize and adjust all of these windows or however you want them to be. And we'll demonstrate that here in just a second.

So once you do that, what you would do, go in there and click on Finish. And by clicking on Finish what this will do for us is it'll give us the ability to go in there and adjust all of these windows. What you'll see you'll have My Layout One default being popped up, and the one-- the way that you know you're on this particular layout versus any of the others that are on this list, it'll have that black check mark next to it.

And you'll see right here beneath this line these are the prebuilt layouts that we have in Active Trader Pro. Everything above this line, this is a layout that somebody on our team has created here on the Trading Strategy Desk. So you won't see these above the line, but beneath the line, you'll have these, and then, of course, whatever that initial layout here, which is my layout default. I'll take a moment here to kind of readjust it, then we'll come back and talk about saving this information, deleting the layouts, and creating a new layout. So as I see it here, I'm going to go up and I'm going to kind of adjust some of these things. And we're going to talk more about the Positions window here in just a moment.

Let's say I want to keep it something like this, I want to make my chart like that, that, and there's a little bit of negative space on here, maybe I would add a

second quote, it's probably what I'd end up doing, have it look something like that. So once I do that, let's say I like this, I'll go ahead and put in S&P 500 information right up here, make a couple of quotes here at the bottom. And let's say once I do that I like the way that my layout looks and I want to save it. Well, if we come back to Layouts here again we're on this one because of the black check mark, if I don't like that name, My Layout 1, that's just the default way that Active Trader Pro names the layout, you can always go in there and hit Save As. And if we wanted to do that, let's say we wanted to name it ATP Demo, of course, you can name that whatever you want. And then you just go in there and hit Save.

And once you hit Save, you'll notice that it'll move it up to the top here, and we can go in there and we can always rename it if we'd like, hit the Save button. And whenever you make an adjustment, my personal way of doing this is to go in there and if I want to keep the adjustment, I immediately go in there and save it once I'm done making it. That's a personal preference of mine, doesn't have to be done that way but I think it's helpful to make sure that you're keeping the work that you've worked hard on.

From here you can also make this the default. You'll notice that My Layout 1 all the way down here is going to be the one that has the word default in parentheses. So if I were to log back into Active Trader Pro after logging out, it would actually take me to this layout. But let's say I want to make this my new default layout, if I hover over the name of the layout here, I can click on Make Default.

And then further once we take care of all that, if let's say we don't want this layout anymore in the future we could probably tidy up some of these, they're

probably duplicates as you see the ATP Demo right up here, we can always go in there and delete the layout. So that's how you would do this right here. So once you get all of those things set up, let me just talk maybe for a little moment about the general setting. So we walk through the layouts, and we're going to spend the remainder of this session as well as sections two, three, and four talking about the rest of the windows that we have here. So don't think that a chart, the positions, and the quote boxes are the only things that we have in Active Trader Pro, they are certainly not. And we will be covering them more in-depth here. But let's just say we're set with that for right now. Move over to the Settings window, and let's take a look at some of those things that we just looked at. So maybe we initially set up our account with this theme color in the zoom as-is, and the default account being this way, and we no longer want that to be the case. Well, this is the page here Settings, General where we're going to be able to change some of that information. Under My Account, we could always switch that to a different account as the default if we would like.

The other thing that's really important here, now it should default to market data update frequency, streaming, I have it on five seconds here, it usually makes it run a little bit faster when I'm running a bunch of other windows doing things like recording but if you're wanting the most recent or updated quickest data, you want to switch this over to streaming. and we've got to make sure we're hitting Apply after we make any changes that we want to make. But you can also do two seconds, five seconds, or one minute Auto Update. Just keeping in mind streaming is going to be the fastest but it does use a pretty large amount of data. So just keep that in mind if you're having any kind of latency issues with it. You can always switch that over, just you have to recall that it's going to be lagged just a little bit.

As you'll notice here, we can switch over to black or blue, we can switch the zoom again, we can make that smaller if we prefer to make it smaller. And then we'll talk about the sidebars. So what a sidebar is, let me just maybe put on the sidebar right here for a second, hit Apply. What this does is it pops up additional space over here on the right-hand side where we can put windows. So let's say that quote box is not one I want usually out but I want it still there. Well, you can hide it in the sidebar, you want to see it again there's a little thin line and let me do this, let me make this bigger again so everybody can see this. There's a little thin line with an arrow pointed to the left, if we click on that, you'll see it pops out the window, and we can always drag that back out, hide this if we want, and we'll back over into our main screen. So you can set up the zoom or sidebars for the right, the left, or both, or as we usually keep them, none.

And then final thing I'll talk about here, the Auto Save Layout feature. So we don't have it to automatically save the layout changes, so any changes that we make, they either have to be saved by, again, going back to that layout, going to the layout that we're on, and actually saving the layout manually. But it will not automatically save it if we were to log out. So if we log out and log back in the next day, whatever we've done at this point is going to be lost. And that's intentional for us because we don't want to save the changes that we're making for each session.

Another option, this is personally the one that I use on my own device, Prompt to Save Layout Changes. So what this will do for us if we go to exit out of Active Trader Pro, either here in the upper right corner or log out, what it will do is it will give you a pop-up window that says, do you want to save your

changes? And at that moment in time maybe you've forgot to save your layout. If you want to save it you can click Yes, if you don't, you can click No. And that's helpful for me because sometimes I want to save the changes, and sometimes I don't.

And the final option is automatically saving the layout changes. So what this is going to do is whenever you log out of Active Trader Pro either by clicking that or this, it'll automatically save whatever you've done. Now, you're probably saying to yourself, well, why wouldn't I do this every time?

The only caution that I would have for you is if you're not actually logging out, if it's like force quit on you, oftentimes the changes that are being made won't actually be saved. So you have to just be really cognizant of that. Ran into that when I initially started here because I believed that this is the actual default. So remember just you can change the Auto Save to whatever one is going to make the most sense for you but I'll leave it back on this do not save for our purposes today.

All right, so with that being said, this is pretty much what I wanted to cover here at the beginning portion, just showing everybody again how to download the platform, the basics of getting started with the layouts, how to save your layouts, and changing your general settings. That being said, Peter, I will turn it over to you to take us through some of the information that we want to cover for the rest of this session.

Peter Janssen: Yeah, absolutely. Thanks for that, Matt. I'm going to go ahead and show my screen now, which is going to be just a blank gray screen at this very moment in time, and that's done by design. What I wanted to point out, of

course, Matt as you had covered, lots of what we have to offer here more or less towards the right as far as settings is concerned, well, make no mistake, there's a tremendous amount of different capabilities here also but towards the top left. So we're going to go ahead and pick a few of these, working our way from left to right, and then, Matt, as you had mentioned in these future videos, we're going to go ahead and dive much, much deeper.

So as far as different shortcuts as they are called, there are these icons, a couple of arrows pointing in either direction, it's going to go ahead and pull up just a default standard trade ticket for you in which you'd be able to, of course, type in your symbol, whether you're looking to buy or sell, and the quantity, among other things, pretty straightforward. There's a number of other icons here towards the left as well, things like being able to pull up your orders, as well as being able to get a quote for certain products. So if you wanted to type in SPY in just a moment, you've got the ability to use these types of shortcuts and get the information that you are looking to view.

Now I'm going to go ahead and go through maybe just a few others as we take a look under Accounts, well, it's not an icon, it actually has this dropdown menu to choose from. This is where you'd be able to access your different positions for accounts that you own. Maybe you have options in your portfolio and you're looking for a different way to view your options or perhaps trade them. Options by underlying strategy or expirations, going to be a great resource for you.

You also have the ability to view your closed positions, your balances, your history. You get where I'm going with this, folks, it's really all things that have

to do, and pertaining to your specific accounts, your unique positions, and the different portfolios that you monitor are going to be housed here.

As I scroll over some of these, you'll actually notice that there's a small icon here. And what that icon represents is that if you were to click on say Portfolio Summary or Portfolio Performance, it's actually going to launch you to Fidelity's website. And I think that's important because Fidelity's website itself has a tremendous amount to offer.

However, there are benefits to Active Trader Pro as well, just like Matt said, even for some of you that don't consider yourself to be active traders, being able to potentially view your positions, which I'll pull up now for just a moment to get a look and feel, but being able maybe to pull up your positions for a particular account as I scroll over, as well as maybe a watch list which is housed under Quotes and Watch List, is something that you're limited to on Fidelity's website.

Of course, you can only have one web page pulled up at any particular moment in time. And part of that benefit for those once again that don't really consider yourself to be active traders but want to have a way to monitor your accounts, as well as maybe a watch list and some other things that we'll discuss is important. So here we have it, positions towards the top and now you can actually have a different watch list down below.

I'm going to go head to one that we had created and that's another point, a Dow 30 watch list, anything that you've created on Fidelity's website is actually going to carry over here to Active Trader Pro as well. Now, make no mistake, one thing I wanted to cover among just a particular tool or two is the really functionality that's going to carry itself over numerous other tools.

And what I mean by that is towards the top left here we notice an account that's listed and we also notice positions. Well, under this first dropdown menu you actually have the choice to view different accounts of yours. Now, our test account just has one but perhaps you have an account that you trade in, maybe you've got a retirement account, perhaps you have a joint account with a family member, friend, or a child, whatever it might be. This is where those would be listed. These are actually accounts that you do have your funds in.

You can also view your account groups, and you can also switch between watch lists. That's one thing I wanted to say a benefit is being able to have positions and watch list pulled up but potentially you don't want to have both of these, maybe you think it's a redundancy, make no mistake, you've got the ability to actually cycle through and then pull up any of these watch lists that you see, and that will dynamically change the page that's in front of you.

Now, if you are within an account, let's stay with that theme for just a moment here, there's going to be a sub-menu that you have to choose from. Now, we had seen towards the top left when we clicked on Accounts, once again, this is all things, your personal information, but we had seen things like options, closed positions, balances, and history. And of course, you can go ahead and actually pull up a balances page, and now you're going to have a new window. Once again that's something that you're able to do on Active Trader that you're not able to do on Fidelity's website but this looks a little bit cluttered, right? There's maybe too much going on. You have the ability to actually go ahead and close out of this and through any of these dropdown menus as you were with positions, well, you can change this let's say to balances and in one

click of the mouse go ahead and actually get the information for balances pertaining to the account that you have listed. So of course, I'm sure folks are familiar with your balances, how to read this but that functionality is really what I wanted to drive home and the ability to use these dynamic menus, as well as sub-menus to cycle through the information, whether it's your history, positions, maybe closed positions even, or balances is, I think, extremely, extremely helpful.

Now, there are other things in future videos, we're going to cover really all things trades and orders, different ways to place trades, whether it's our standard trade ticket, multi-trade, or for some of you options traders out there the different availabilities that are there. We also noticed already that we've got the ability to click on Quote, this is also where you could find time and sales watch lists, you name it.

So I'm not going to go through the entire list, stay tuned for those future videos where we will cover these in greater depth. But another part of what I wanted to show really in terms of that functionality since I think that the positions, watch lists, and maybe even a quote, as well as a chart, are probably those I'd say few tools that within layouts, as Matt had said, you can have any layout that you want you can have that customization. But I would be willing to bet that positions, watch lists, and quotes are probably going to be up there as far as some of the most commonly used ones that I want everyone to be familiar with.

What I want to point out with that regard is this, here towards the top once again we have positions listed for a owned account here in the test environment. And we also have a watch list down below. Some of the

functionality I want everyone to be familiar with is the fact that these columns specifically are sortable and what I mean by that is by default, well the symbol is going to come in alphabetic order, of course, a to z, you have the ability to click this and it's going to reverse. You can do that with each of these columns. Perhaps you wanted to see what the highest price security in your account was, you can click these columns or any to go ahead and actually sort that data as you see fit with whatever it is that's going to help you monitor your portfolios or make decisions.

Now, when we're looking at these column headers, the other thing that you can do that you want to be familiar with is really the ability to actually click, hold, or as it's called sometimes, drag and drop. So I have clicked and engaged my mouse cursor, I'm now moving this column 52-week range, let's just go ahead and drop it here between our Real-Time Analytics, and Trade Armor tool, I'll do that once again as you see, you have the ability to drag and drop these column headers in order to go ahead and get front and center the information once again that's going to help you monitor your portfolios or potential investments you're looking to make.

That functionality is similar with the positions or with the watch list, drag and drop as many of our other columns within Active Trader Pro is something that for any of you that are beginning with the platform are going to want to familiarize yourself with.

The other thing that each of these independent columns can do among moving them or sorting them is actually have them removed. Let's say that you're familiar with what BAC, Bank of America is, or does, you can right-click on this description field or any of these other columns and you have the ability

as you see here to click on Remove Column, which is going to go ahead and actually take this column out of your entire list that you have here.

Now, of course, if you had inadvertently done that, perhaps or would like to add a column one by one, you can also go ahead and right-click, and I'm sure some of you notice that there actually is the ability to add column. Well, when you hover over Add Column you notice this exhaustive list of different fields and data types that you can actually go ahead and add, and by doing that what it's going to allow you to do is actually add back perhaps let's say maybe the days range and a visual type, that's going to go ahead and actually have it added to your screen where you had launched that. So that's something that, once again is going to carry over from positions you're looking, at to watch lists, as well as some of these additional tools that we're going to cover in these future videos but I thought that that would be important to go ahead and show the one by one aspect.

Now, let's say that you are downloading Active Trader Pro for the first time, just like Matt had walked us through previously, you're seeing a number of different visuals and different fields that maybe don't actually speak to what helps you with your decision-making process. Well, rather than going through one by one or moving them to the end of this scroll bar so that they're out of sight, out of mind, you do have the ability within your positions, as well as watch lists to click on this Manage button here towards the top right of both of these windows, and what that is going to do is allow you to add and remove different columns.

This is going to go ahead and pull up that exhaustive list that we had seen previously. However, rather than having to click on each one by one and

having them added, you'll be able to peruse around the different fields that are available, specifically pick and choose which ones you prefer to look at. And what that will do as you have them added is move them over towards the right-hand side.

So if you wanted to potentially see what the price-to-earnings ratio was, or maybe a 52-week high and low, rather than this visual date, you can go ahead and click on those two, uncheck 52-week range. And that's going to go ahead and have them added over towards the right-hand box, which is going to be the ones that are selected versus the ones that are available.

So essentially, in a nutshell, these are the ones that you get to choose from, when you click them they're going to go ahead and present themselves over here towards the right as the ones that you have selected. Don't forget to go ahead and actually apply. And what that will do then is have those updates made rather than one by one, you can do all of these in one fell swoop. And now quickly scroll over to see specifically well, when was that 52-week low or that 52-week high date, which might provide you information that you find helpful.

Now, above and beyond that the other thing that I wanted to go ahead and show, of course, was the difference between being able to make modifications to present the information that you want specifically for a positions page or a watch list, I'm going to go ahead and exit out of this screen and pull up a quote. As we had already shown, you have the ability to actually click on this hotkey, or of course, you can come here to Quotes and Watch list and click on Quote if you would prefer.

As we type in a symbol let's just go back to SPY for a moment, the S&P 500 ETF, when we take a look, what that's going to do is present us a number of information down below, you can scroll this window as Matt had shown, he actually had a couple of different quotes on his page. But you also have the ability to resize this, whether you'd like this to get dragged towards the bottom, you can also drag it towards the right, and you'll notice that more information is going to be available.

The difference and key distinction I wanted to make, and this is maybe one of the last points that I'll leave you with before turning it back over to you, Matt, is that as we had seen with Positions and Watch Lists there actually was a dedicated button to click on Manage. Well, with the quote itself if there's information that you perhaps do not want to view, you have the ability to right-click on it, and much like we had seen before, you've got the ability to remove that field or as you had seen, let's say that you want to add a field, hover back over Add Field and then you'll notice this fly-out list.

It's not as exhaustive but the point I wanted to make is that the right-click functionality within the Quote tool itself is going to be how you add and remove different items of interest or different data field points. It does not have its own standalone kind of Manage button, which is what I had shown up to this point in time. So I thought that that would be something I wanted to go ahead and distinguish between perhaps just a couple of the different ways that you can do things within Active Trader.

Last thing that I will show, I'm sure as you have seen me right-click on different viewpoints and different tools, is the fact that if you right-click on any of these

tools folks, I can't emphasize this enough, the very last choice that you should have is actually going to be titled Help.

So if you were to click on Help for a quote, what that's going to do is take you straight into the Active Trader Pro user guide, and rather than having to sift through the table of contents yourself and try to find specifically where the information you're looking for a little bit of help with is located, that right-click functionality and clicking on the Help is dynamically going to take you into that portion of the actual Active Trader Pro user guide, where you can, of course, read a little bit further and see all that it has to offer above and beyond the time that we have for a video of this nature. Just to emphasize that once again, let's say you're within a Watch list tool and you like to see perhaps you're thinking about something and you had a question, click on Help itself and what that will do just like we had seen with the Quote tool is launch you specifically to the help that's referenced for positions and watch lists.

Having that said, I'm sure that's something that will come up in future videos. I know that we're just scratching the surface at this point in time. I thought that that was important, Matt, but at this point, how about I turn it back over to you to show some additional things with the remaining time that we have?

Matt Davison: Sure. Yeah, absolutely. So wanted to kind of end this session with two things here. So the first thing that we want to show is the ability to link different tools together. So notice whenever we come to either a chart or a quote box, certain ones will have right next to where we would enter the symbol, this square that's supposed to be a chain link, I think with a line going through it.

And if we click on that, it's going to give us a number of different options here. We can do gray, blue, orange, purple, and yellow. Notice how the gray tool is going to be the default. And that's important to note for a couple of reasons. So the main reason why this default or gray tool is more important I would say, than the other ones, if we link both of these to gray, notice how they go blank. If we come up to one of our windows like our positions, our watch lists are going to look like this, our filters tools that we're going to be covering in later sessions.

Well, they don't actually have this ability to link, which means if they don't have that window or that link button, they're automatically going to link to gray. So if we come over here and we double-click on Bank of America, notice that it's going to immediately snap that symbol into my chart and to my quote box, but it didn't do anything with this quote box because I haven't linked it up.

Now, if I were to switch this from gray to blue let's say, and I wanted to switch, and we'll go to TTWO, well, when I switch this one to blue it no longer will snap that symbol into my chart because it's in blue now. We have it in the quote box but not in this one.

And further, we can do this let's say we wanted to link these two together, and we'll do the NDX, NASDAQ 100. Well, now it changes these two but it doesn't change my quote. So that's all it's really doing here is it's just trying to make it a little bit quicker. And this is especially helpful.

Again, I don't want to get too much on this topic right now in this session but when we start coming over here and using our filters tools or if we have our

watch list and we want to cycle through things really quickly, really helpful tool. Usually gray is going to be the most popular but you can link different tools with different colors if you would like. So wanted to hit that topic.

Last thing that we'll cover for this session, you'll notice that we have this ticker at the very bottom of the screen here. And this is a custom-made list that we've built out. So we have the major indices, Dow Jones, NASDAQ 100, Russell 2000, S&P 500, 10-year Treasury yield, and the VIX. The way that we're getting that, if we click on where it says Ticker in the bottom left-hand corner here, and then we come up to where it says View, well, we have a custom ticker list. But notice we can select any of these things up here. So if we have an account with a bunch of positions in there and you want to see those cycle through on the bottom kind of like the tape would run on financial media, well, you can select that.

You can select any of your watch lists, those are the other things that are populating on our screen here. You can choose one of those. Or as we've done, you can create a custom ticker list. And if you wanted to edit that list, you can click on Edit Custom Ticker, and you can add up to 50 different symbols. And what will effectively happen here is if you start adding too many, you'll notice 50 symbols will not fit on the bottom, it'll rotate them.

One other thing that we can do here, so we have market breadth on the bottom. So if we go and click on ticker market breadth, you can see for the various exchanges, so AMEX Exchange, NASDAQ, New York Stock Exchange, we can look at the advancing versus the declining issues, new high issues, versus new low issues, and then volume advancing versus volume declining.

So we can do that respectively for each one of these major exchanges and we can add those.

And maybe I'll just add a couple here so we can kind of see what it looks like if we have multiple. And you'll notice as soon as I add those on there well, it takes off the broad indices and some of those other tickers that we have, and it adds the AMEX and the NASDAQ. So this is kind of just another way of looking at market breadth through Active Trader Pro. And you'll see after a couple of seconds it'll switch it back to these symbols. So it'll just rotate back and forth. And if you have more than a couple of symbols here at the bottom, let's say you had 30, 40 symbols, it will just rotate through all those symbols so you can keep an active eye on what's going on out there in the market.

With that said, that will conclude everything for session one. Again we'll be talking about trading and all of the different trade tickets that we have, as well as some of the default settings that you can use in session two.

END OF AUDIO FILE

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