SpiffyCharts 2.6 Quick-Start

Technical Analysis

for

Stock and Commodity Traders

Your SpiffyCharts license requires that the program only be used for the purposes indicated below. Any other use invalidates your license and requires that you cease using SpiffyCharts.

The purpose of SpiffyCharts Standard Version is to allow you to download data from one of our licensed vendors, CSI, MJK or Dial Data, using an account set up recognizing that NTech software is being used. Note the free trial systems which are in place for each data vendor.

The Pro Version also allows the use of free data sources.

Warranty

There is no warranty, expressed or implied. You use SpiffyCharts entirely at your own risk. All complex software has defects and SpiffyCharts is no exception. Also, technical analysis software can be misapplied, leading you to incorrect conclusions. Always "paper trade" any new system you develop before committing real money in the securities markets.

New versions of SpiffyCharts may be downloaded from the website at www.spiffycharts.com

Contact us at:

info@spiffycharts.com or
bugs@spiffycharts.com or
suggestions@spiffycharts.com

Your Email subject must include SPIFFY or our spam filter will delete it.

SpiffyCharts is a trademark of Investors' Technical Services of Austin, Texas.

Sept 25, 2008

SpiffyCharts Quick-Start

SpiffyCharts 2.6 is a Macintosh Program!

Out apologies to Windows and Linux users, but the disparate menu and window handling designs forced us to make too many compromises.

Once over Lightly

SpiffyCharts is a general purpose charting program which will download daily update data, maintain your data files and chart and print plots. You can use the many built-in indicators, write your own indicators or input those you find in trading magazines. You can backtest and optimize trading systems. SpiffyCharts will also display reports for your personal portfolios, and scan your data files indicating trading actions to be taken tomorrow.

In order to use this program you must have Internet access and have it configured properly.

Program Installation

Download the compressed SpiffyPackage appropriate for your computer and expand it. Place it anywhere on your hard disk. All required files preferences etc. reside in the Spiffy Folder and no other changes are made anywhere on your computer. Installation is now complete except for entering your name and activation code. If desired you can make a shortcut to the program and leave the shortcut on your desktop.

To uninstall SpiffyCharts just drag the SpiffyCharts folder to the trash.

Registration

You must enter your name and registration code before you can use SpiffyCharts. Register through the SpiffyCharts web site. Registration is free.

When you register you will receive an email with your name and registration number.

When you first start SpiffyCharts a window will be opened into which you type your name and registration number. Your license number will not work unless you enter your name exactly as it appears in your email.

SpiffyCharts

SpiffyCharts supports the three functions required of a general purpose charting and trading program.

1) Downloading security data, editing and correcting data, when needed.
2) Backtesting and system development.
3) Portfolio tracking and scanning for tomorrow's trades.

All functions are accessed through the menus.

SpiffyCharts does not support the use of intra-day data.

The screen shot below of the menu bar and the File menu shows the normal Macintosh functions as well as access to our very simple macro setup and access to allow restoration of recently used charts.

The folder alias allows easy transfer of free data files so that they can be used as input for SpiffyCharts.
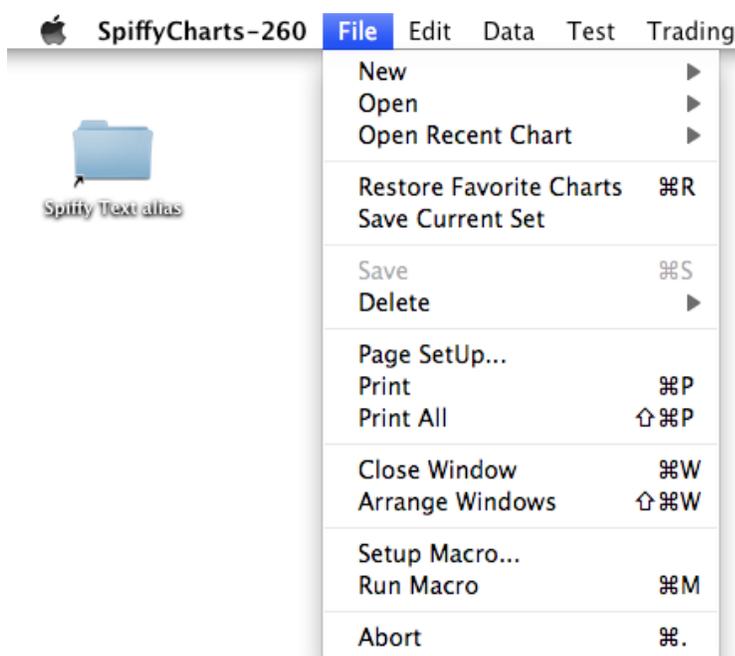
Downloading Data

SpiffyCharts supports three commercial data vendors directly and also data downloaded from Finance.Yahoo.Com, the semi-free service EODdata, a free SP500 source and other text data sources. Requirements for text data sources are detailed in the Tech Manual.

Each data service has its own methods for user identification and for specifying daily and historical data. The details are given in the SpiffyCharts Technical manual. This manual will touch only on the most commonly used functions.

The **Data** menu gives access to all of the functions required to download and maintain your data.

The **Get Data** item allows you to get data from a commercial source or directly from Yahoo.

Data from other sources must be downloaded using your web browser and then transferred to your Spiffy Text folder. (This can be a single file or a folder of files. Files may be zipped.)

Account Setup

Choose the data service you expect to use from the **Service** menu item, and then select **SetUp**. A dialog will open allowing you to enter the required user identification information. To use the CSI "Test" setup enter TES as your UserID and any two sets of five numbers as your user numbers.

It is important that when obtaining account id information from your data vendor that you identify yourself as using SpiffyCharts (from NTech) otherwise the id information you get will not work with SpiffyCharts.

Portfolio Setup

The SetUp item also allows you to define the items you wish to download on a daily basis.

The portfolio setup dialog is specific to each data service. The entries are generally easy to understand, and most dialogs have one or more buttons labeled simple "**?**" When the mouse cursor passes over such a button the program displays helpful information.

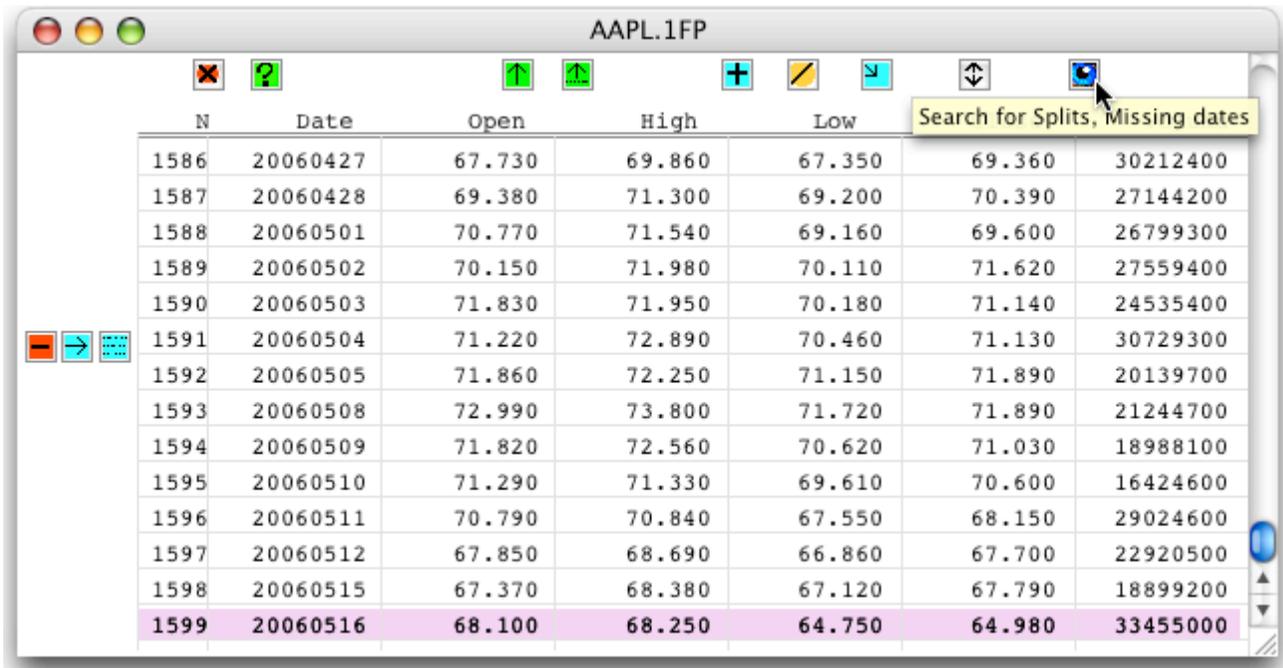Detailed examples are given in the technical manual.

During the "Post" operation SpiffyCharts takes the incoming data and converts it to the correct format and appends it to your data files. If you should accidentally download and extra date or two SpiffyCharts will use the extra new data to overwrite old data. You will not get any extraneous data in your files.

Get Data

When you select **Get Data** SpiffyCharts will connect to your data vendor, download the data and will then post it to your data files. You will be informed of progress through messages written to the Messages Window.

Edit Data File

When you select Edit Data file you will be allowed to browse through your data folder to select a data file, which is then opened in a window such as the one below.

N	Date	Open	High	Low		
1586	20060427	67.730	69.860	67.350	69.360	30212400
1587	20060428	69.380	71.300	69.200	70.390	27144200
1588	20060501	70.770	71.540	69.160	69.600	26799300
1589	20060502	70.150	71.980	70.110	71.620	27559400
1590	20060503	71.830	71.950	70.180	71.140	24535400
1591	20060504	71.220	72.890	70.460	71.130	30729300
1592	20060505	71.860	72.250	71.150	71.890	20139700
1593	20060508	72.990	73.800	71.720	71.890	21244700
1594	20060509	71.820	72.560	70.620	71.030	18988100
1595	20060510	71.290	71.330	69.610	70.600	16424600
1596	20060511	70.790	70.840	67.550	68.150	29024600
1597	20060512	67.850	68.690	66.860	67.700	22920500
1598	20060515	67.370	68.380	67.120	67.790	18899200
1599	20060516	68.100	68.250	64.750	64.980	33455000

Window title: AAPL.1FP — Tooltip: Search for Splits, Missing dates

The edit functions are controlled by the small buttons. Put the cursor on a button and leave it for a few seconds and a small window will open and describe the function.

Details are given in the technical manual.

One of the functions of the Edit Data window is **Export**, which reformats the data in a way which may be useful in other programs. (You can also export any list of securities.)

Charting and Backtesting

The **File>Open..** menu allows you to select any of the defined "Models." You will then be allowed to select any data file, which will be opened, the 'studies' calculated and plotted.

There are two ways that you can modify the "studies" lines on a chart.
A) Using the formula Bar - very flexible - almost unlimited possibilities.
B) Using the popup menu at the lower left of the chart window - maybe easier to use.
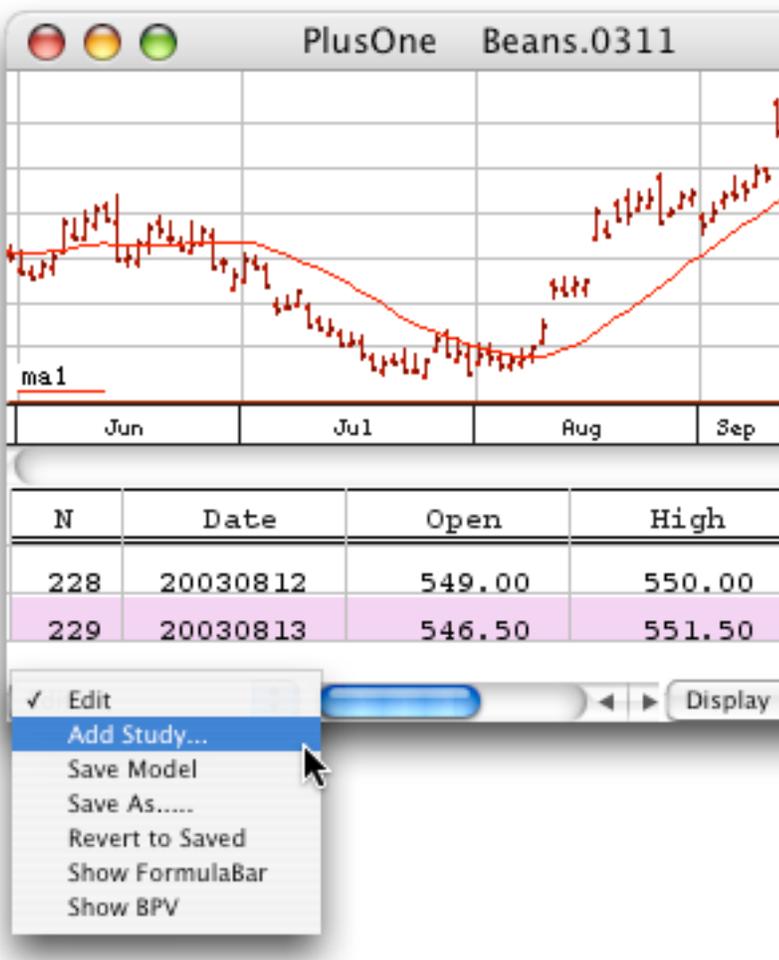
Adding Studies though the Dialog

If you choose Add Study you will be presented with a dialog that allows selection of a variety of studies.. After you make the necessary selections and inputs your study will be added.

("Study" is a common name for mathematical derivative. "Study" is shorter.)

*** **See Technical Manual for a complete listing of available studies.***

Formula Bar

You can also add studies to the chart by using the Formula Bar. This is more powerful and more complex than using the dialog. Use whichever method you want or need.

When you move the cursor over the top of the data display and into the box labeled "N" the mouse cursor will change to a plus symbol.

Click the mouse button and an empty Formula Bar will be displayed. Enter the name for your new study in the title box and the formula in the formula box. Check on/off plotting and set the other plotting choices using the popup menus. Details of using the Formula Bar are given in the Studies Appendix.

If you move the mouse cursor over the title at the top of a study column the cursor will change to a "Disclosure Triangle." Click the button and you will see the formula used to create the column. Observing the formulas above a number of the columns will aid you in understanding how the formula bar works.
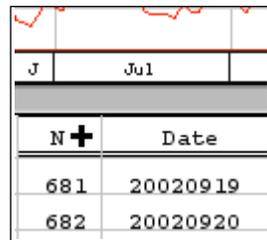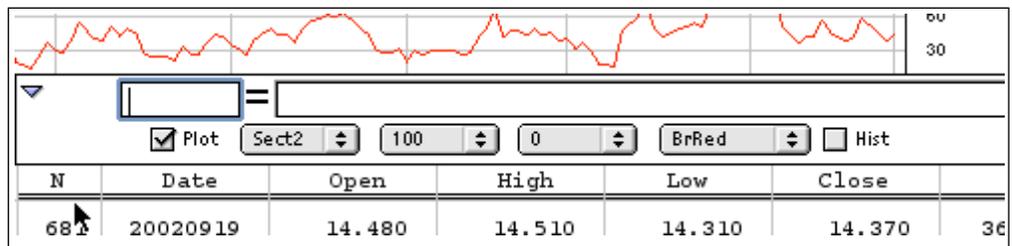
An empty Formula Bar. The Title box is highlighted. The Formula Box follows the equals sign.

Formula Bar showing a simple formula.

When you have entered a new formula or edited an old formula two buttons will appear to the left of the Title Box. If you click on the X box then the formula will revert to its original state. If you click on the check mark SpiffyCharts will analyze your input and if it appears acceptable the program will create a new column of data and will plot it according to the choices made in the plotting commands.

When entering a formula you may place spaces anywhere you wish. Input is generally not case sensitive. Column titles must be 3 or more letters starting with a letter (a-z) and without any math symbols.

**A complete list of formula commands is given in the Technical manual.**

When the formula for an existing column is displayed there is a button shown labeled **Delete.** This button allows you to delete any column you have created. This is the only way to remove a column.

Chart Display

You will note two icons near the top right of the chart. The "CloseDoor" and "OpenDoor" icons will change the number of bars being displayed.

You can also vary the number of bars being displayed in the chart window by using your <UpArrow> and <DownArrow> keys. If you go below two pixels per bar the bar chart will be replaced by a line chart of closing prices. If you drop below one pixel per bar then SpiffyCharts will "crunch" the data, displaying all available data across the chart, regardless of size.

You will also note one or two red lines across the chart. These lines separate the data from the chart and the price bars from the indexes. When you move the cursor over one of these lines the cursor will change to a finger. Hold down the mouse button and the finger will change to a double headed arrow. Slide the double arrow icon up or down and release the mouse button and the red line will be draw at the new location.

	Aug		Sep		Oct

ma1	ma2	ma3
14.61105	14.88210	14.431
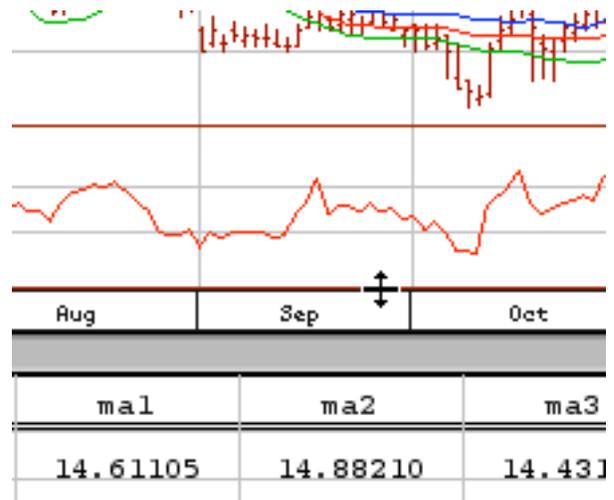
Chart Cursor

If you hold down the mouse button while the cursor is over the chart, the cursor will become a sharpe pointer, temporary cross hairs will be drawn accross the chart and a box will display the computed height of the cursor. Data shown in the worksheet will be scrolled to the date under the cursor.

40.82719

XC2

pr	May	Jun	Jul

9

Copy Chart to Clipboard

When a Chart is the frontmost window touching <Command> C causes the current Chart window to be copied to the clipboard, whence you may paste it into any program which will accept a PICT. Note that the PICT includes any data being displayed.

Multiple Charts

SpiffyCharts can open any number of chart windows. Note that a chart is opened using a Trading Model, that Model is read into memory and all charts opened with that Model are created and controlled by the information held in the Model memory. Thus, if you have several charts opened using a single Model and you edit any one of the charts then ALL CHARTS WILL BE UPDATED TO THE NEW CONFIGURATION.

If you attempt to open two chart windows using the same Model / data file combination then your attempt will fail however the appropriate chart will be brought to the front of the screen.

When you close chart windows you will not be asked about saving changes until the last window using a particular Model is closed. When the last window using a Model is closed its memory will be released.
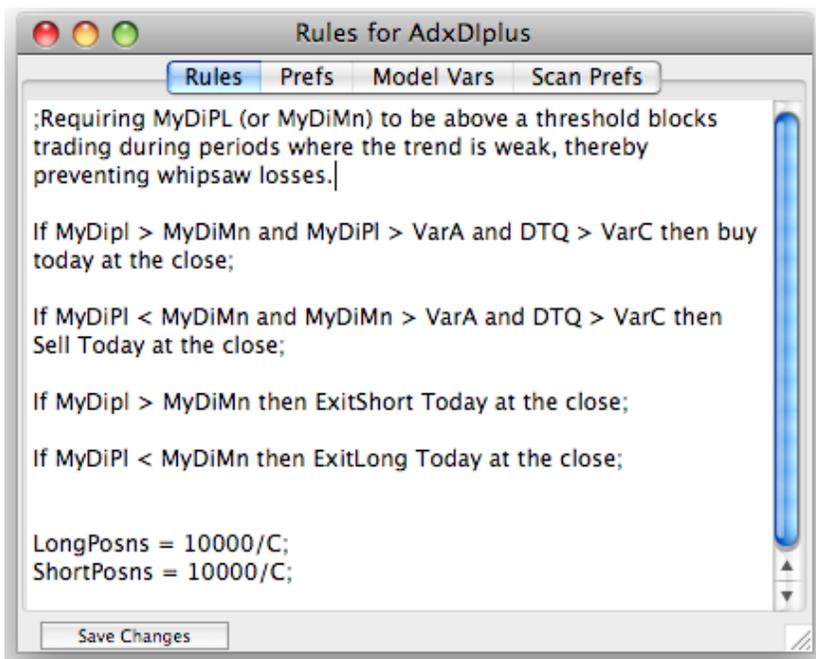
Chart Command Keys

There are three command keys which you can use with an open chart, UpArrow, DownArrow and "D" (for data.) Hold down the "inside out clover leafkey, then touch the Up/Down arrow keys to expand or compress the chart. Hit <D> (without the Ctrl or CloverLeaf!) and you will be allowed to select a data file to be opened with the same trading model, into a new window of course.

BackTesting with SpiffyCharts

Testing a set of rules and studies   with old data - backtesting - allows a trader to learn their strengths and weaknesses and to develop new trading methods. We refer to a set of studies and rules as a Trading Model.

If you have a chart open and click on the button labeled **R** near the top right of the chart your will open the Rule Window for the trading model. The rules can reference any data in the worksheet as well as the three "Model Vars." You can define your own variables within the rules, if needed.   Your rules can also access a large number of trade information items. Detailed information on the rules is given in the Technical manual, but note the following:


```
Rules for AdxDIplus

  Rules   Prefs   Model Vars   Scan Prefs

;Requiring MyDiPL (or MyDiMn) to be above a threshold blocks
trading during periods where the trend is weak, thereby
preventing whipsaw losses.

If MyDipl > MyDiMn and MyDiPl > VarA and DTQ > VarC then buy
today at the close;

If MyDiPl < MyDiMn and MyDiMn > VarA and DTQ > VarC then
Sell Today at the close;

If MyDipl > MyDiMn then ExitShort Today at the close;

If MyDiPl < MyDiMn then ExitLong Today at the close;


LongPosns = 10000/C;
ShortPosns = 10000/C;

  Save Changes
```

Each rule is separate and complete from all others.
The order in which rules are written is unimportant.
Any calculations are made just before the close of each bar.

To backtest your model with the one data file shown in your chart, choose the menu item **Test>TestCurrent** (or use <command> T>) Almost immediately you will get a report and daily equity chart and your original chart will be redrawn with pale pink and pale green rectangles indicating periods when the model was long or short.

Optimizing with SpiffyCharts

You can "Optimize" a trading model which is set up to use the Model Vars. Use the Rule Window Prefs tab and to set your Model Vars tab select T**est>Optimize Current**.   Please understand that your goal in optimizing is not to get really great results, but to find ways to get consistently good results.

You can optimize up to three variables simultaneously. See the Technical manual for examples and details.

Testing and Optimizing with Lists

The **Test** menu has two items, **Test List** and **Optimize List.**

Lists are exactly what the name implies, lists of security symbols, generally all of the same type, and always one symbol per line. By same type we mean all stocks, all mutual funds etc.
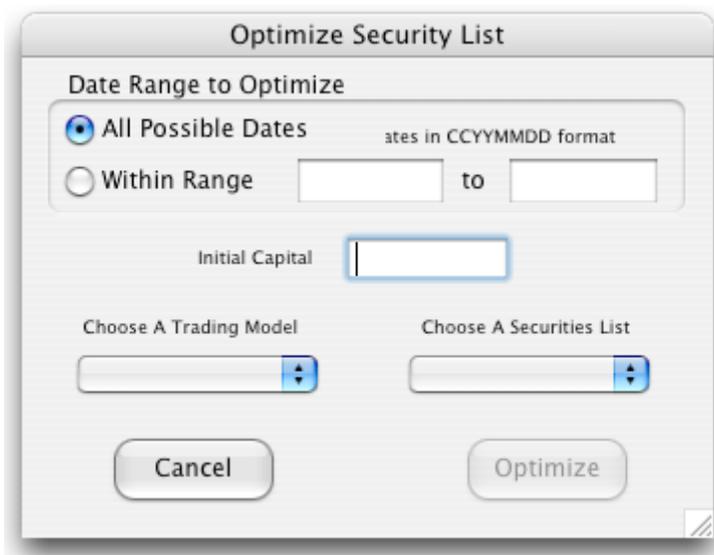
The *Lists* item will allow you to create or edit a List. There are several ways to edit a list. Dragging symbols from a **Report** window is described in the next section. You can paste a list of securities that you copy from any window, including the names of data files you copy from the desktop using your OS to select and copy.

There are three things that SpiffyCharts can do with a list of securities.

Backtest, **Optimize** and **Scan** (covered in the next section of this manual.)

Choose the **Optimize List** and you will get the dialog shown. In order to optimize your trading model must be set up to use Model Vars.

One thing to note about testing and optimizing lists is that all of the files in your list are opened simultaneously and trade testing proceeds bar by bar for all files. i.e.. All files will be tested for a given day before proceeding to the next day. SpiffyCharts will keep track of the total capital committed for all open positions and will block any new trades if such a trade would cause total commitments to exceed available capital. (The trade will be " opened" with zero positions.)

Optimize Security List

Date Range to Optimize
◉ All Possible Dates   ates in CCYYMMDD format
◯ Within Range   [   ] to [   ]

Initial Capital [   ]

Choose A Trading Model   Choose A Securities List
[▼]   [▼]

[Cancel]   [Optimize]

SpiffyCharts Portfolios

The Portfolios show the most recent data for your securities.
They can also indicate the current value of your portfolio.

All Symbols

The **All Symbols** report shows data for all current securities in your data folder . The format for this report is
fixed, each line showing:

Symbol Date Open High Low Close Vol OpenInt PriorClose Name

Symbol is the data file name, the title which your data service uses.

Date is the most recent update for this security, in YYYYMMDD format.

Open, High, Low, Close are the most recent price data points. They will be shown as zero if no data is
available, as will Vol and OpenInt and Prior Close.

There is one column which you can edit: NAME. Some stock and mutual fund symbols may be difficult to
remember. For example you might want the NAME for the Symbol LUV to be SWA (Southwest Airlines.)
You can type in any reminder or name you want.

Reset

When you first open the AllSymbols report it will be empty. Touch the **Reset** button and SpiffyCharts will go
through your data folder and add all the securities it can find. Going through a few thousand data files will
take 5 to 10 seconds, depending mainly on the speed of your hard disk. Reset will also remove any securities
which have not been updated in the past month.

Your reports will be empty until you download some current data!

Trading Model

Each Report Window has a ***Trading Model*** popup menu will allow you to choose any of the Models you have
defined.   Then when you double click on a symbol that symbol will be plotted using the chosen Trading
Model. This is also the model which would be used for scanning

Editing Security Names

The last entry on each line   of the All Symbols window is the name of the security.   These names are
automatically filled in by SpiffyCharts. If you wish to enter a name or wish to edit an old name you may do so
by clicking at the start of the name or the name space. A small pale yellow window will be drawn on top of
the old name. Edit any name shown in the yellow box. Hit <Return> or <Enter> to exit this editing function.
This name will be written to the file on disk.

Personal Reports

Trading>New Portfolio will allow you to define your own reports. The New Report dialog will show a list of possible items to be shown in your new report.   You can select any set of items, in any order with the exception that Symbol is always the first item.

You can select items from the left column and move them to the right column either by dragging or by double clicking. Move items out of the right hand list by double clicking. After you have set the format and named the report, hit the OK button you will see your new, empty report. (The name of the report will also be added to the **Reports** popup menu.)

You populate your new report by dragging symbols from the AllSymbols list to your new report. Remove symbols from the report by choosing with the mouse and then touching the <delete> key.

sTwo items in your new report may be edited: Shares and Total cost. Any information you enter for these two items will be specific to this new report. If you create a second (third..) new report using some of the same symbols as in your first personal report,   the Shares and Cost information from the first report will not be available in the other reports, i.e. the data in the Shares and Cost columns are specific to each of your personal portfolios. When you enter information in these two columns the calculated columns CurVal and CurNet will automatically be calculated.

You can also drag security symbols to or from one of your lists.

Reformat

Use the Reformat button to modify your report at any time. Information for items no longer displayed is not lost.   For example, assume you originally formatted your personal portfolio report   so that you can enter number of shares, cost etc, and   that you then reformat so that Shares, Totcost, Curval and/or Curnet are hidden. If you reformat again at a later time the hidden information will still be there but updated to reflect chnages in prices.

Charting

Double Click on a symbol and that security will be charted using the model as set in the popup menu.

Delete

Hit the delete button and the report will be deleted.

Using the Scanner

A trader who is following a large number of stocks or commodities will find it very time consuming to review each of them, one by one. Why not let the computer look through the lot quickly, scan them, and alert the trader to any actions that appear to be required by the trader's system. The actions indicated by the scanner are not intended to be the absolute word, but must always be reviewed by the trader,

The SpiffyCharts Scanner is accessed through one of your Report windows or via the Scan pop-up menu. The Scan popup menu will allow you to scan a list or a folder.Within one of your report windows you can use the pop-up menu in your report window to select your trading model, then punch the eye icon to start the scanner.

Note that it is advisable to sort your Symbol list so that the A's are at the top. To sort the Symbols just click on the heading. If the order is reversed then click again. Sorting is required for proper operation of the indexing window.
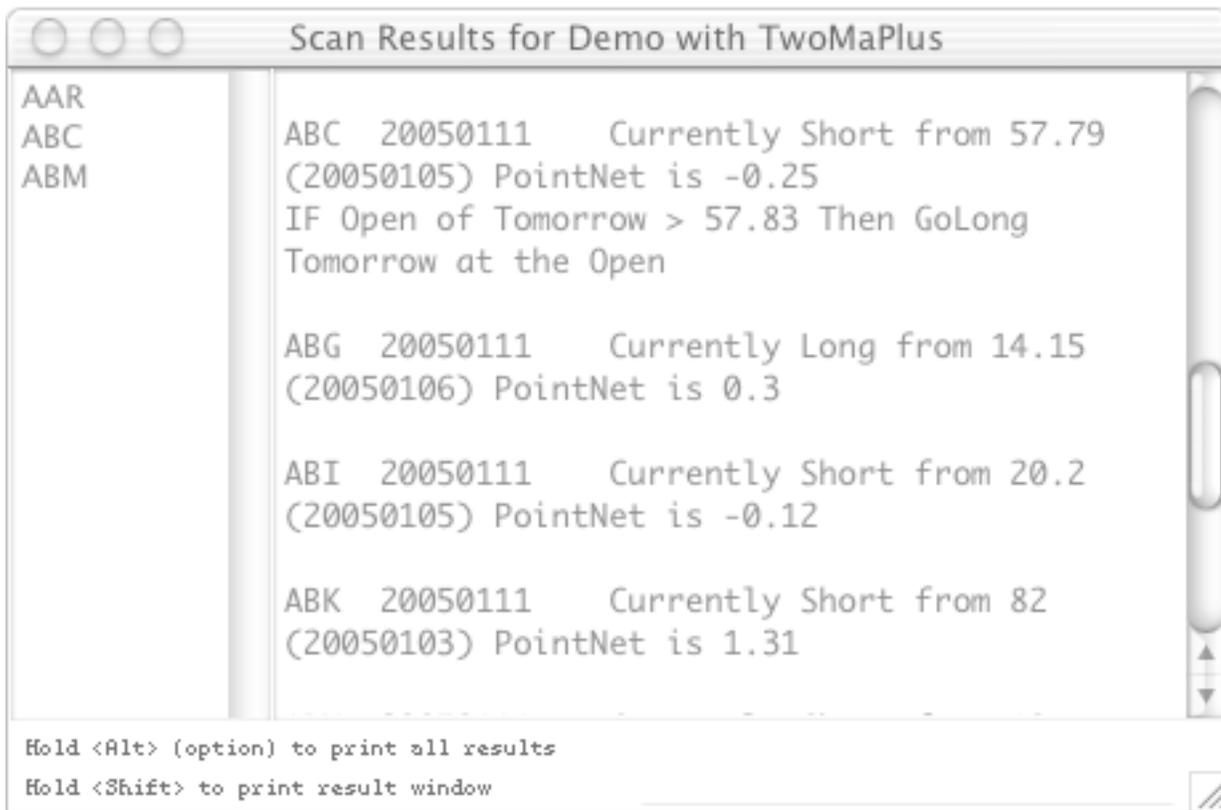
Model Setup for Scanning

Any reasonable trading model can be used by the scanner, but you should note the caveats listed below. The more complex the model the more carefully you will need to scrutinize the scanner output.

Scanning Example

When you punch the eye icon SpiffyCharts will open each file in sequence. The file will be tested for three things, length, missing data columns and up-to-date data. If the file fails any of these tests the file will be closed and an error message will be given.

Files which are up to date and otherwise usable by the trading model you selected will be opened and your trading model will be applied to determine your current position which will be used to generate the first line of the Scanner report for each security. The Spiffy Scanner will then evaluate any rules that will be active tomorrow. These rules will be used to generate one or more additional lines.

These results go to a window with two fields, a Symbols list which is an index to the full scan results shown in the right field. You can print or copy-paste the results but they cannot be edited.

```
 ○ ○ ○        Scan Results for Demo with TwoMaPlus

AAR
ABC        ABC  20050111      Currently Short from 57.79
ABM        (20050105) PointNet is -0.25
           IF Open of Tomorrow > 57.83 Then GoLong
           Tomorrow at the Open

           ABG  20050111      Currently Long from 14.15
           (20050106) PointNet is 0.3

           ABI  20050111      Currently Short from 20.2
           (20050105) PointNet is -0.12

           ABK  20050111      Currently Short from 82
           (20050103) PointNet is 1.31

Hold <Alt> (option) to print all results
Hold <Shift> to print result window
```

Click on a symbol in the index list and the scan reports will be scrolled to display the results for the symbol chosen. You can also type a symbol shown in the index to scroll to that portion of the scan results window.

Controlling the Scanner Index

You will note that the index does not list all of the securities which were scanned.   The limited list allows you to go directly to those securities which meet your selection criteria. It also controls printing.
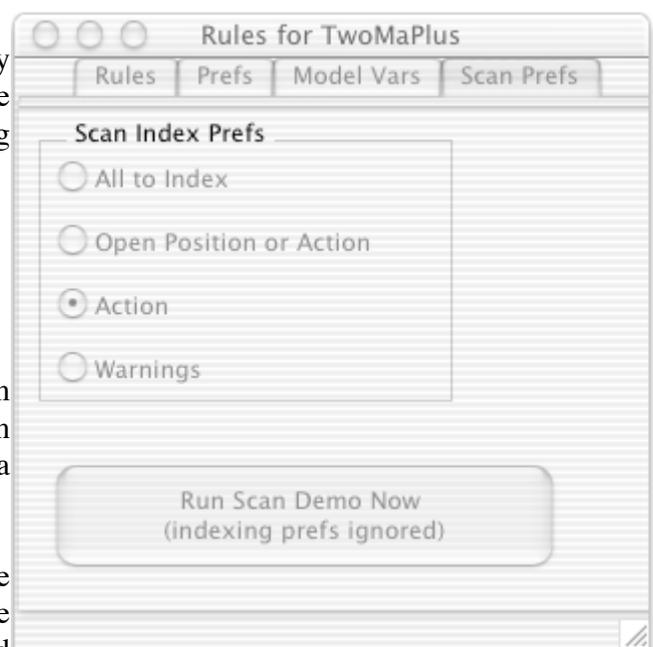
You set the indexing criteria by opening the trading model   through the Chart menu.   Then in the Rules window for the model click on the Scan Prefs tab.

The choice selected above, "Action" indicates that only when a trade is to be made or a stop is to be set should the security be listed in the index.   The other indexing choices are generally obvious.

Printing Scan Results

The File menu Print item will cause printing of the scan results for those securities listed in the index. Other scan results will not be printed unless you hold down a "modifier" key....

Hold down the <Shift> key when you select Print and the content displayed in the Scan Results window will be printed. Hold down <Alt> (<Option > on the Mac) and all the scan results will be printed.


```
 ○ ○ ○          Rules for TwoMaPlus
     Rules │ Prefs │ Model Vars │ Scan Prefs

  Scan Index Prefs
   ○ All to Index

   ○ Open Position or Action

   ◉ Action

   ○ Warnings


            Run Scan Demo Now
           (indexing prefs ignored)
```

Demo-ing the Scanner

Hitting the **Run Scan Demo Now** button in the Rule Window, as shown above, will cause SpiffyCharts to Scan the last twenty bars (if available) of the first data file you opened with the current model. (The "Not Up To Date" warning will be turned off.)

You should run a demo of the scan on any model you wish to use in your trading and the carefully review the scanner output in order to understand any limitations the scanner may encounter with your trading model.