

Stock Quotes

For

PalmOS®



Introduction

Stock Quotes is an easy to use stock portfolio tracker without the over complication of graphs and charts. Stock quotes concentrates on watching the value of your current investments and alerting you to any significant changes that you might be interested in. Stock Quotes has no desktop components so to install simply double click on the Stock_Quotes.prc file and perform a HotSync to install Stock Quotes. Stock quotes can be launched to its main screen from the application launcher on your hand held device. Stock quotes will only allow entry of 3 stock items before a registration key is required. To obtain a registration key you must refer to your supplier. Once you have obtained your registration key, select *Options->Register* from the application menu and enter the registration code; you will then be able to enter more stocks.

Main Screen

The main screen displays the day to day information you require on your portfolios. The portfolios being displayed on the screen is selected using the category menu in the top left hand corner; selecting the *All* category will show a collated display of all of your stocks. For color devices, positive figures are displayed in blue and negative figures displayed in red. The last row in the display shows the appropriate totals. At the bottom of the form the date/time shows the last time that the stock quotes were retrieved. Two buttons are available, *New* for adding a new stock item and *Get* to get the stock quotes from the Internet. The columns that are shown may be selected (as shown below) from the *Options->Preferences* menu item; the available columns are as follows:

Stock Quotes					▼ All
Symbol	Last	Chg	Value	Prof%	
↑ AMX	42.93	0.58	2146.50	16.44	
↑ IBM	89.86	0.04	2156.64	9.59	
↓ MSFT	28.29	-0.23	1697.40	-0.15	
↑ SUN	66.23	0.58	3973.80	-6.72	
Totals			9974.34	2.08	
<div> <div>New</div> <div>Get</div> </div>					10/20/06 3:57 pm

- Last price. Last traded price for the stock. This value is normally retrieved from the internet, although may be entered manually by selecting the relevant stock symbol and updating the last price. Note that the last price is shown in cents/pence.
- Price change. Change in price since the previous day. Note that the price change is shown in cents/pence.
- Value. Current value of the stock (that is the last price multiplied by the quantity).
- Profit. The total profit that has been made on the stock. This includes dividends and is calculated as the value minus the cost plus the dividends.
- Profit percentage. The total profit as a percentage of the original cost.
- Dividends. dividends received for this stock.

Stock Quotes

▼ All

Stock Quote Preferences

☒ Show last price
☒ Show price change
☒ Show value
☐ Show profit
☒ Show profit %age
☐ Show dividends
☐ Show cost
☐ Show quantity

OK

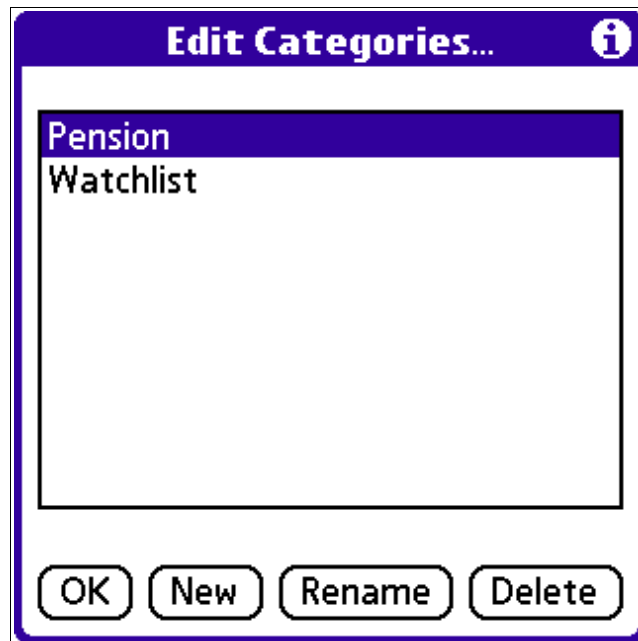
Cancel

- Cost. The cost basis for the stock. That is the total price paid including fees for the quantity of stock given.
- Quantity. The number of stock shares held.

Creating Portfolios

Portfolios are synonymous with categories and use the palm category facilities; throughout the documentation portfolio and category may be used interchangeably.

To create a new portfolios you simply select the *Edit Categories...* option from the pop up category list at the top right of the main screen. A dialog, similar to that shown below, is shown to allow you to add or edit the existing portfolios (categories). This dialog is used in the same way as for standard palm applications that support categories (for example, the contacts database).



Entering Trades/Dividends

If you wish to trade in stocks that are already in your portfolios, Stock Quotes provides some extra facilities to simplify updating your stock information.

To enter a new trade and/or dividend, tap on the relevant stock symbol on the main screen; be sure you have selected the appropriate portfolio on the main screen. The stock editing screen will be displayed, and on the right of this screen are three buttons for trading (Buy, Sell and Div); tap on the appropriate button. Select *OK* on the stock edit screen when you have finished entering trades/dividends.

Buy

Tapping on the *Buy* button will display a dialog allowing you to enter a quantity and cost. The quantity entered is the number of shares you have just bought, and the cost is the price you have paid (including fees). Selecting *Done* on the dialog will cause the quantity for that stock item to be increased by the quantity entered and the total cost will be increased by the cost entered.

Sell

Tapping on the *Sell* button will display a dialog allowing you to enter a quantity and price. The quantity entered is the number of shares you have just sold, and the price is the total amount you have received for the shares. Selecting *Done* on the dialog will cause the quantity for that stock item to be decreased by the quantity entered and the total cost will be decreased by the price entered.

Dividends

Tapping on the *Div* button will display a dialog (similar to that shown on the right) allowing you to enter a dividend. You can either enter the total dividend received, or the dividend received per share (by selecting the *Per share* check box). The dividend entered is added to the total dividend for the stock. If the *per share* check box is selected the dividend is multiplied by the number of shares before being added to the total dividend; note that this method is not recommended as the total calculated in this way may not take into account rounding and fees/taxes.

The image shows two overlapping mobile application screens. The background screen is titled 'Stock Edit' in a purple header bar, with a status 'Unfiled' in the top right corner. It contains the following fields: 'Exchange:' with a dropdown arrow pointing to 'American', 'Symbol:' with the text 'AMX', 'Quantity:' with the value '5000', and 'Tot. Cost:' with the value '1843.50'. On the right side of this screen are three buttons: 'Buy', 'Sell', and 'Div'. Overlaid on top of the 'Stock Edit' screen is a smaller dialog titled 'Dividends' in a purple header bar, which includes an information icon (i) in the top right. This dialog has a field 'Income:' with the value '3' and a check box labeled 'Per share' which is currently unchecked. A 'Done' button is located at the bottom left of the 'Dividends' dialog.

Automatic Updates and Alerts

One of the most important parts of managing a portfolio is knowing when big changes are occurring; specifically when the price for a share in your portfolio drops below a certain level, or rises above a certain level. This can also be used on watch lists to look out for a specific price being hit when buying a stock. Stock Quotes makes this easy. For each share you are monitoring you can select a minimum and maximum price (or leave as 0 to ignore) – if the share price moves out of these bounds you will be notified. To do this, tap on the stock symbol on the main screen and tap the *Alert...* button on the resulting stock edit screen. Enter the minimum and maximum value you wish to monitor the share for (note that this is in the same units as the last price, usually cents/pence).

Of course this facility is only really useful if you don't have to press the button to update the stock prices all the time; so Stock Quotes contains a scheduled update. To activate this, select the *Schedule...* option from the *Options* menu on the main screen. This will display a dialog similar to that shown below; select the time range you wish the update to be active for (i.e. when the relevant stock exchange is open) and the frequency of the updates.

Stock Edit Unfiled

Exchange: ▼ American

Symbol: AMX

Quantity: 5000 Buy

Tot. Cost: 1843.50 Sell

Dividend: 0.00 Div

Share Price Alerts i

Minimum: 35.00

Maximum: 60.00

Done

Stock Quotes ▼ All

Symbol	Last	Chg	Value	Prof%
↑ AMX	42.93	0.58	2146.50	16.44
↑ IBM	89.86	0.04	2156.64	9.59
↓ MSFT	28.29	-0.23	1697.40	-0.15
↑ SUN	66.23	0.58	3973.80	-6.72
Totals			9974.34	2.08

Quote Update Schedule i

Times: 7:00 am - 5:00 pm

Update: ▼ Every 15 minutes

Done

Important Note:

Depending upon the stock exchange, price information can be delayed by 15 minutes or more; also, while Stock Quotes does its best to read the quote information as scheduled, circumstances beyond its control may prevent it doing so (for example, loss of Internet connection). It should also be noted that frequent updating will reduce battery life.

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