



Getting Started Manual



ShareFriend Pro – Programmed For Profits

Contents

Foreword.....	4
Getting Started	5
Disclaimer	5
Getting Started	5
The Share Explorer.....	5
Favourites	6
Information Shown Above all Graphs.....	7
Charts.....	9
Changing the Graph Style	9
Zooming In and Out of a Chart	9
The Next Step.....	10
Plotting Indicators.....	11
Removing Indicators	12
Drawing a Line Study	12
Deleting Line Studies	14
Two Shares “Simultaneous View”.....	15
US Dollar, Pound or Euro Values.....	16
Daily or Weekly Data	17
PDSnet Opinion Feature	17
Templates and Layouts.....	18
Templates	18
Layouts.....	20
Backup and Restore	23
Fundamental Information.....	24
Company Information.....	24
Company Websites	26
Economic Indicators.....	27
Data Window	28
Removing the Data Window.....	29
Watchlist.....	30
Adding a Share	30
Opening All Shares.....	32
Viewing All Shares in a Watchlist.....	32
Deleting a Share from the Watchlist.....	32

Portfolio Manager	33
Open Positions (OP)	33
Cash Position.....	33
Transactions.....	34
Holdings	35
JSE Over Performance Graph.....	35
Reports.....	35
File.....	36
Password.....	36
Export.....	36
Showing a Graph of a Share in a Portfolio	36
Simulation	37
Other Useful Tools	38
A Final Word and Tips to Get Started	39
Choosing a Share.....	39
Choosing a Sector	39
Overall Market View Scan.....	39
Market Carpets	40
Market Scan	40
Unit Trust Scan.....	41
Technical Analysis Scans	41
Moving Average	42
The Moving Average Crossover	43
Unusual Percentage Volume	44
Price Volume Trend	44
Overbought/Oversold.....	45
MACD.....	46
Stochastic Oscillator.....	47
Comparative RSI.....	48
Current Company Information	49
Naming Conventions Used in All Databases	52
Indices.....	52
Commodities.....	53
Currencies	53
Bonds	54

Advance Decline Indicators.....	54
Money Market	54
Useful Hot-Keys.....	55
Installation Instructions	56
Windows 10	57
Windows 8	57
Windows 7	58
Windows Vista	59
Updates on Windows 8.....	61
Updates on Windows 7.....	62
Updates on Windows Vista.....	64

Foreword

It is a well-known fact that most people do not like reading manuals.

With this in mind, we have tried to keep this very concise and easy to read. And, in order to get a quick start with your new program, it is in your own interest to set a little time aside and read about the many useful and unique features of this program.

To assist you in quickly finding your way around this booklet follow these guidelines.

- ❖ If your program is already installed and working, go to the next page called:

“Getting Started” - page 5

- ❖ If you still need to install your program it is advisable for you to first go to page 51 and read the section entitled:

“Installation Instructions” – page 51

- ❖ For useful tips on the software go to “A final word and tips to get started” which is a section written for us by Jean and Ben Temkin, both of whom are financial journalists and have written several well-known books about investing in the stock market.

“A final word and tips to get started” – page 34

- ❖ Page 47 to 49 have very useful information about the extremely large amount of data included in the database of this program. This section is called:

“Naming Conventions used in all Databases” – page 47

- ❖ And to really get yourself around the program very quickly do have a look at page 50 called:

“Useful Hot-Keys” – page 50

Getting Started

On Your Path to Success

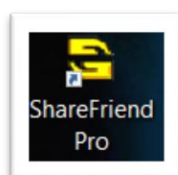
Disclaimer

Except as permitted by law, no part of this document may be reproduced or transmitted by any process or means without the prior written consent of the developer, by publishing this document, does not guarantee that any information contained herein is and will remain accurate or that use of the information will ensure correct and faultless operation of the relevant product or service. The developer provides its products and services as tools to be used by investors who are aware of the risk inherent in securities trading, not as recommendations to buy or sell. The developer, its agents, affiliates, and employees shall not be held liable to or through any user for any loss or damage whatsoever resulting from reliance on the information contained within this document or through the use of the developer products or services.

Getting Started

To start the program:

1. Look for the shortcut Icon on your desktop and click on it.



2. Once the program is loaded, you will either see a graph of a share or a blank screen.
3. To bring a share, or other indicator, to the screen you can either start typing the short name of the share or you can click on the file menu and select Open Share.

The Share Explorer

Typing a share name immediately on your keyboard, or selecting Open Share from the File menu, opens another window called “Share Explorer”, which shows the names of all shares and other indicators stored in the database.

The Share Explorer is fairly unique as it shows all the important details about a share such as:

- The official short code as used by the JSE and Stockbrokers.
- The official short name as used by the JSE and Stockbrokers.
- The full company name of each share or indicator.
- The sector the share belongs in.

The unique part of the Share Explorer is that all shares have been grouped in their correct market segment such as Top 40, Mid Cap, Small Cap, Fledgling, Alt-X, ETF's, etc.

This unique feature is very useful if you specifically want to look at shares in one or more of these groups.

For instance, to see all shares in the Mid Cap segment of the market, click on the Mid Cap tab and only Mid Cap shares will be shown sorted in alphabetical order.

When looking at the Share Explorer, the names in one of the columns will be shown in red. This indicates that this is the **active** column.

Clicking once, with the left mouse button, on a column title, will make that column active.

For instance, clicking once on the Ticker column will make that column active which means that you will only be able to find shares by the Ticker code.

Clicking twice on a column title sorts the names in that column in descending or ascending order.

For instance, if you want to see the names of shares sorted by their sector, double click on the Sector tab. The moment you do so, the names in that column turn red and are sorted in alphabetical sequence.

Generally, it is advisable to select the "All Series" group as this contains the names of all shares and indicators contained in the database.

A quick way to load a share is to start typing the name of the share. This opens the Share Explorer window and by following the keys you press on the keyboard it will load the share the moment it has found a complete match to the keys you pressed.


Favourites

The "Favourites" folder is useful if you have a range of shares or indicators you wish to look at on a regular basis.

To enter a share in the Favourites folder, first load the share, then select the Quick Access menu by clicking the right mouse button and select the "Add to Favourites" option.

Once shares have been added to the Favourites folder, you can open all shares at the same time in this folder by selecting the Favourites folder in your "Share Explorer" menu and clicking on "Open All".

This command will open all shares and stack them in a Cascade manner on the screen.

Once all shares are loaded, you can close each one individually by clicking on the small X in the top right corner of the active graph screen or you can close them all simultaneously by clicking on the  in the top tool bar of your software next to the currency symbols.

Browsing through each of the shares one by one is also possible. First activate the Favourites folder in your "Share Explorer" and call up the first share in this folder by clicking on "Open" once the share you wish to open is highlighted.

Thereafter you can click the arrow icons in the Tool Bar -  .

Another way to do this is to click "View" in your top menu and click on "Next Chart (User list)" or "Previous Chart" (User list).

Information Shown Above all Graphs

On opening the program, the very (top) first line shows the program logo and program name.

The next line is referred to as the Menu bar. It provides access to the various menu options of the program.

The next line is referred to as the Tool bar with a number of small icons that provide quick access to frequently used functions.

The 3rd bar contains the static information reflecting the most recent statistics of a share.

The first item on the Statistic bar is the share's short name, the next item is the official JSE share code followed by the official full company name.

The next name is the name of the sector the share falls in directly followed by the market segment such as Top 40, Mid Cap etc.

This is followed by the closing price as was recorded after the last download date.

Next you'll see the date of the closing price which is shown in brackets directly next to the Closing Price.

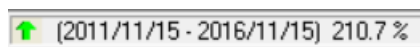
Therefore, if you wish to see when last the program was updated, you should look at the date reflected on this line.

The next item on this bar indicates the liquidity of the share. In this instance liquidity means the amount and frequency of trades that take place in a share.

Generally speaking you should only invest or trade in shares that are either Liquid or Highly Liquid.

Illiquid and especially Highly Illiquid shares should be avoided.

Towards the extreme right of this bar is a very useful indicator that indicates the percentage growth or decline of the share of the period currently shown on the monitor. This indicator has an arrow up or down, a range of dates and a percentage figure as per this example:



The green arrow indicates that the price of this share increased and if it shows a small red arrow facing downward it shows that the share price declined. The dates shown reflect the time period shown on the screen and the percentage shows the percentage by which the share price increased or declined during the time period shown on the graph. In the example shown above, you will see that the share price increased by 210.7% from 15/11/2011 to 15/11/2016.

If this indicator shows a yellow dot then this indicates that the share price has not increased or decreased during the period depicted by the graph.

The next bar reflects the Date and Closing Price of the share directly where the mouse pointer is pointing on your chart. By moving the mouse across the graph you will see these figures change.

This bar also shows the DY, EY and PE figures as they were on the date directly where the mouse pointer is pointing on the graph.

The letters DY stand for Dividend Yield, EY means Earning Yield and PE means Price Earnings.

An explanation of these useful indicators are given in the PDSnet Online Course. Please visit our website for more information and how to register – www.pdsnet.co.za

Alternatively refer to the PDSnet Stock Market Glossary - www.pdsnet.co.za/index.php/stock-market-glossary/

The letters Mrk. Cap is an abbreviation for Market Capitalisation. This gives investors a quick indication of the size of a company. This figure is derived by multiplying the number of shares in issue times the share price.

Deals indicate the number of Deals that were traded on the exchange on the date shown.

Daily or Weekly indicates that the data used to draw the graph is based on daily or weekly prices.

Directly next to the name Daily or Weekly the words (Rand) is shown indicating that the currency used to show the share price graph is shown in Rands. Later in this manual, you will learn that the graph values can also be shown in US \$ or British Pounds or Euros. When local share prices values are converted to another currency it will show the name of the chosen currency.

Charts

Charts are the most integral and visible components of your trading software. And your trading software's charts come equipped with many useful tools. Indicators and line studies are two of the most popular tools people use with charts.

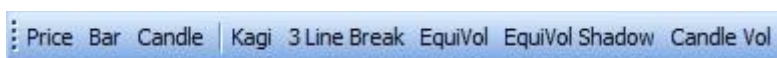
By default, charts are divided into two main parts. The bigger part shows the price plot and the smaller section below the price graph shows the volume in bar graph format.

Changing the Graph Style

The price plot is the line formed on the chart by the share's price information. Users can change many aspects of the price plot's appearance as the program has no less than 8 different plotting styles built-in. The most frequently used of which are candlesticks, bar graph and line graph.

The candlestick graph is universally the most used graph. The reason is that it shows an entire picture about how a share price has moved.

To change a graph style, click the style of your preference in the bottom right corner of your software.



An explanation of these charting styles are given in the PDSnet Online Course. Please visit our website for more information and how to register – www.pdsnet.co.za

Alternatively refer to the PDSnet Stock Market Glossary - www.pdsnet.co.za/index.php/stock-market-glossary/

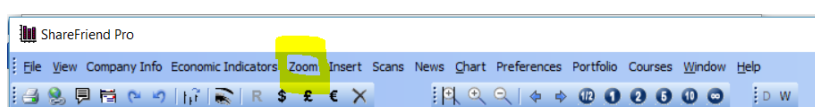
Zooming In and Out of a Chart

Sometimes it is useful to see a smaller or larger amount of data points on a graph.

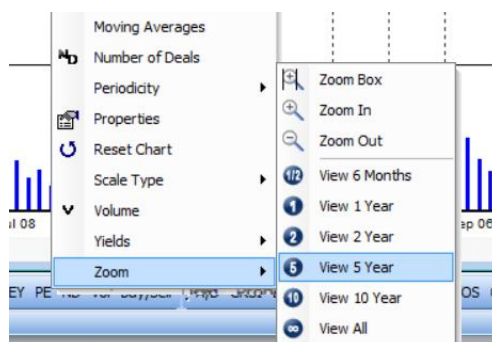
There are several pre-set data periods available and specific data periods can also be manually selected.

There are 4 ways you can change/select the amount of data included in a graph:

1. The first way is to click on “Zoom” in the top menu and select any of the options provided.



2. A quicker way is to activate the Quick Access menu by right clicking the mouse button and select the Zoom option at the bottom of this menu.




3. The third method is to click on the plus or minus enlargement glass icons in your tool bar.



4. The Zoom Box is another zoom feature that is available to you. This allows users to graphically select any time period of a chart.



To use the Zoom Box click on the zoom box icon, . This changes the normal mouse pointer to a small enlargement glass symbol. Select the starting point of the area to be zoomed and click the left mouse button once. Now drag the mouse to the next point. The area you wish to enlarge is now shown as a yellow block super imposed over the graph and once you have selected on the second position click the left mouse button again.

To reset a graph to the original (default) time period, right click your mouse to activate the Quick Access menu and select the Reset Chart option.

Chart data can also be scrolled back and forth at about 2 months at a time by using the left and right arrows found in your tool bar:



The Next Step

Once you have a graph of a share or index on your screen, you can start to use the real power of the program and do either technical or fundament analysis or both.

For technical analysis you would use one or more of the many indicators or line studies provided in the program.

Plotting Indicators

An Indicator is a mathematical formula that uses a share's price or volume data to generate a numerical outcome that is generally plotted in a separate window directly below a price graph.

This program includes over 60 indicators already built-in.

Most experienced technicians will only use about 7 indicators on a regular basis and only in specific circumstances will they use additional indicators.

It is also a well-known fact that some indicators work better on some shares than on others. Users should experiment with the different indicators over various time periods to try and establish what works best for each share. This statement specifically applies to moving averages. And users are advised to try different moving average time periods to establish what time period is the best fit for different shares.

If you are new to technical analysis, it is highly recommended that you refer to the course content which explains technical analysis and a few of the most popular indicators in the PDSnet Online Course. Please visit our website for more information on this course and how you can register – www.pdsnet.co.za

All indicators are stored in one of two places. The first place you'll find indicators is the bottom tool bar of your software where all the **Frequently Used Indicators** are available as icons which are quickly accessible.



The second place is the **All Indicators** drop down menu in the left corner of your bottom tool bar.



Once you have a graph on your screen, plotting an indicator is simple. First select the indicator you wish to use by either clicking on the icon from the frequently used indicators icons, or click on the drop down arrow of the all indicators menu.

And then follow these steps:

1. Click on it once with the left mouse button. This changes the mouse tip into a small clenched fist holding an envelope.
2. Move the mouse to any place on the graph and click the left mouse button once.
3. This opens the indicator properties dialog allowing you to change or accept the pre-set default parameters for the chosen indicator.

4. Once you have made your changes click OK and the selected indicator will be shown.

By following this example, users can plot a number of different indicators on a graph.

Please note: Some indicators use volumes for the calculation and when such indicators are used you cannot remove the volume graph at the bottom of the screen.

Removing Indicators

Indicators can be removed one at a time or all at once.

The quickest way to remove all indicators simultaneously is to click the right mouse button anywhere on the graph window and select the first item **Delete All Indicators** from the easy access menu.

To remove a single indicator, position the mouse pointer on the indicator and make the indicator the active object by clicking on it with the left mouse key.

Once the object is active you will see a number of small squares on the selected line.

Now click your right mouse button and select the Delete option from the easy access menu. In this way users can delete any line of an indicator. Alternatively, once the object is active you can delete it by pressing the Delete key on your keyboard.

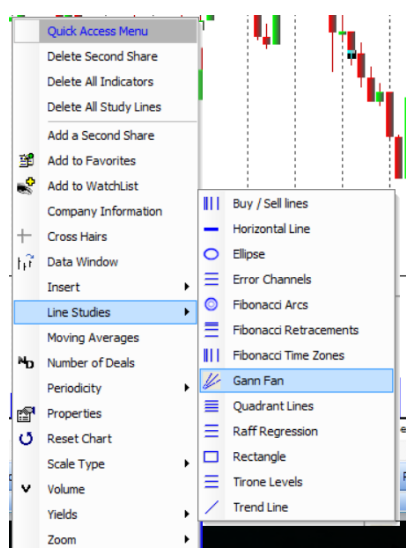
Drawing a Line Study

Line studies are also popular and very useful tools to help you see trends and patterns in a chart, which can give you an edge when making trading decisions.

Line Studies can be applied in 2 ways. The first and longer method is to select the Insert tab from the Menu bar and thereafter select the Line Studies option.



A quicker way is to use the easy access menu by clicking the right mouse button, place the mouse pointer on Line Studies and all the studies available in the program are shown in a separate window.

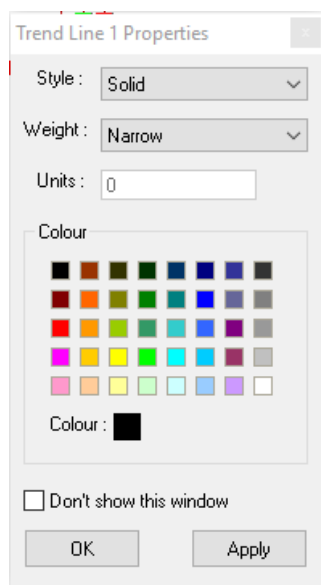


The most popular Line Study to use is the Trend Line and when you click on Trend Line the mouse pointer changes to a small pencil sign. Place the pencil sign at any point in the graph and click once with your left mouse button.

This attaches the Line Study to the first position. Now move your mouse to any other place on the graph and you will notice that a line is drawn from the first position.

Once you are satisfied that the line is in the position where you want it to be, left click your mouse again and the line is now affixed to the graph. A box with various trend line properties will now appear. Here you can choose a style, a weight and a colour for your trend line. Once you have made your selections, click on apply to see the

changes to the trend line. You can make more changes until you are satisfied and then click on Ok.



Here is an example of a trendline with many touch points:



Deleting Line Studies

As with indicators, line studies can be removed all at the same time or one by one.

To remove them all at the same time, open the Easy Access menu with a right mouse click and select "Delete all Line Studies".

To remove one study line at a time, select the line you want to remove and make it active by clicking on it. Once it is active it will show small black squares on the selected study. Then press your Delete key. Alternatively you can also open the Easy Access menu and select Delete.

Another nice and important feature of the program is that even after a line study has been affixed to a graph you can still move the entire line to a different position on the graph.

First make the line active by clicking on it. Once it is the active object on the screen left click and hold. This grabs the line and you can now move it to any other position on the screen

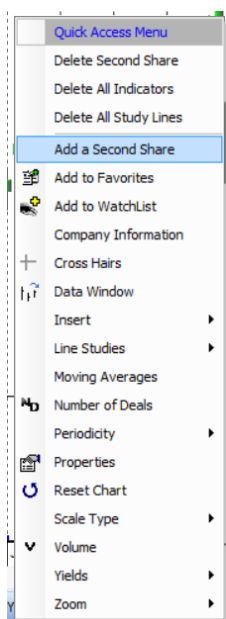
Line studies can also be extended past the last data point of a graph. This is useful if you wish to watch if at some point in the future a price breaks through a previously drawn line study.

Two Shares “Simultaneous View”

This feature enables you to see a direct comparison of 2 different shares.

For instance, if you wish to compare the price performance of Pick ‘n Pay with that of Spar, or any other share/index, you can do so by following these steps.

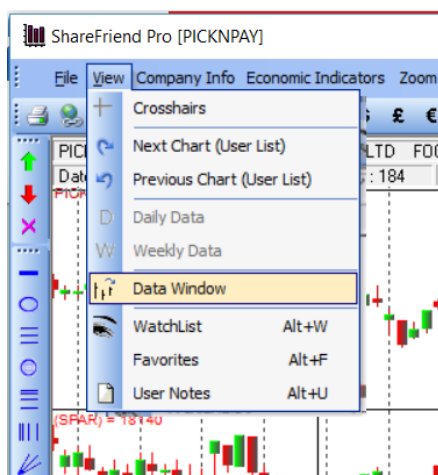
1. First load Pick ‘n Pay,
2. Then right click to activate the “Quick Access” menu and select the 4th option from the top called “Add a Second Share”.



3. The next screen that opens is the “Share Explorer”. Either select the second share by searching for it or start typing the name.
4. The second share will automatically load directly below the active share on your screen.

With both shares on your screen you can change their graph styles simultaneously by selecting a different style at the bottom tool bar of your software.

Direct price comparisons are also possible by calling up the “Data Window” by pressing the space bar or selecting the View option from the menu.



To remove the second share call up the “Quick Access” menu (right mouse click) and select the first option called “Delete Second Share”.

US Dollar, Pound or Euro Values

This great feature is especially for users with an interest in dual listed shares.

All Rand values of shares can, at a single click of a mouse, be converted to either US Dollar, British Pound or Euros.

For instance, to convert Anglo to any of these major currencies first load Anglo. With Anglo loaded, look almost directly below the Zoom icon in your tool bar where you should see 4 icons namely R, \$, £, €.

LO]



To convert Anglo to British Pound, click the Pound (£) Icon and look at the figures on the Y axis to see the converted values.

To restore the graph back to local values click the Rand (R) icon and the chart will reset to the original values.

Once a graph has been converted to one of these major currencies all technical indicators can be used on the graph as normal.

When using this feature with 2 graphs in Simultaneous View, both graphs will change to the foreign values.

Daily or Weekly Data

By default the program will show graph based on Daily closing prices. If you wish to see graphs over a longer period you may like to try looking at graphs based on Weekly data.

As with previously explained options Daily or Weekly data can be called up in three ways.

Users can do this via the View icon in the menu and select the Daily or Weekly data option, or you can do it via the Quick Access menu by using the right mouse key and select the Periodicity option.

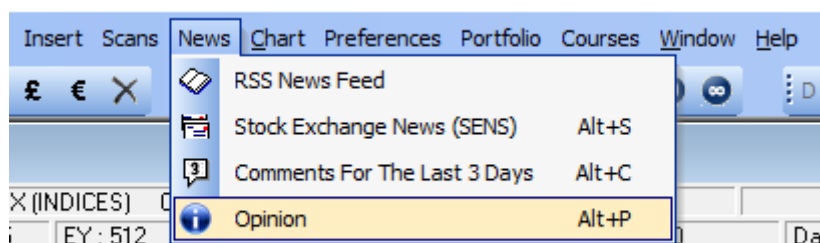
However, there is even a quicker way and that is to click once on the letter D or W


found on the tool bar - 

PDSnet Opinion Feature

This recently added feature includes an individual, detailed and elaborate description of the shares on the JSE. Written after in-depth study of the company's financials and technical formations, these opinions give an overview of the company in the present economic conditions, taking into account their recent results, fundamental ratios and technical outlook.

To access the PDSnet Opinions, simply go to News in the Menu Bar, then click on Opinion.



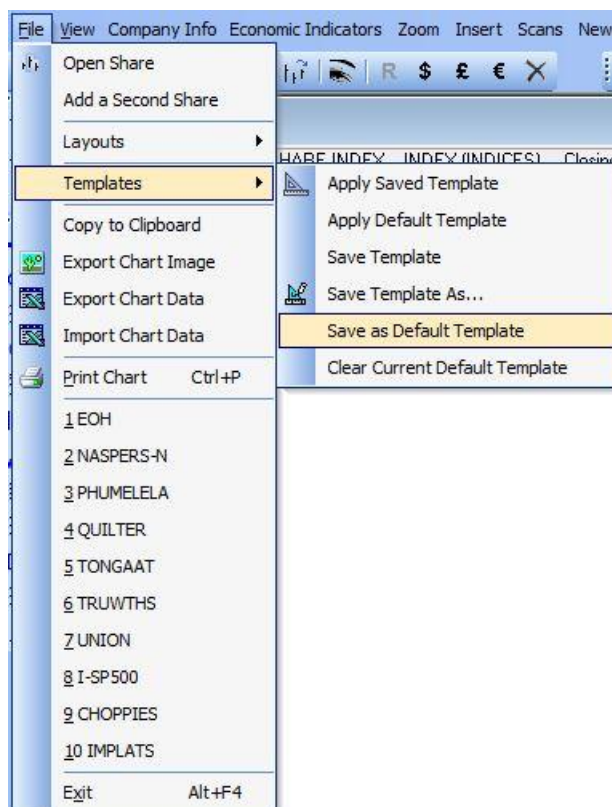
Alternatively, if an opinion exists for the active chart on your screen, you can simply click on the  icon in the top left corner of the screen.

Templates and Layouts

Templates and layouts can be saved and applied to your charts.

Templates

A template refers to a specific set of functions, such as indicators or add-ons, or a combination of both, saved and applied to any chart.



To save a template as your default template, add the indicators and/or add-ons to the chart on your screen. Then click on File in the top left corner of the software, then on Templates, and finally on Save as Default Template.

After doing this, each chart which you open will include the indicators and add-ons applied when saving your default template.

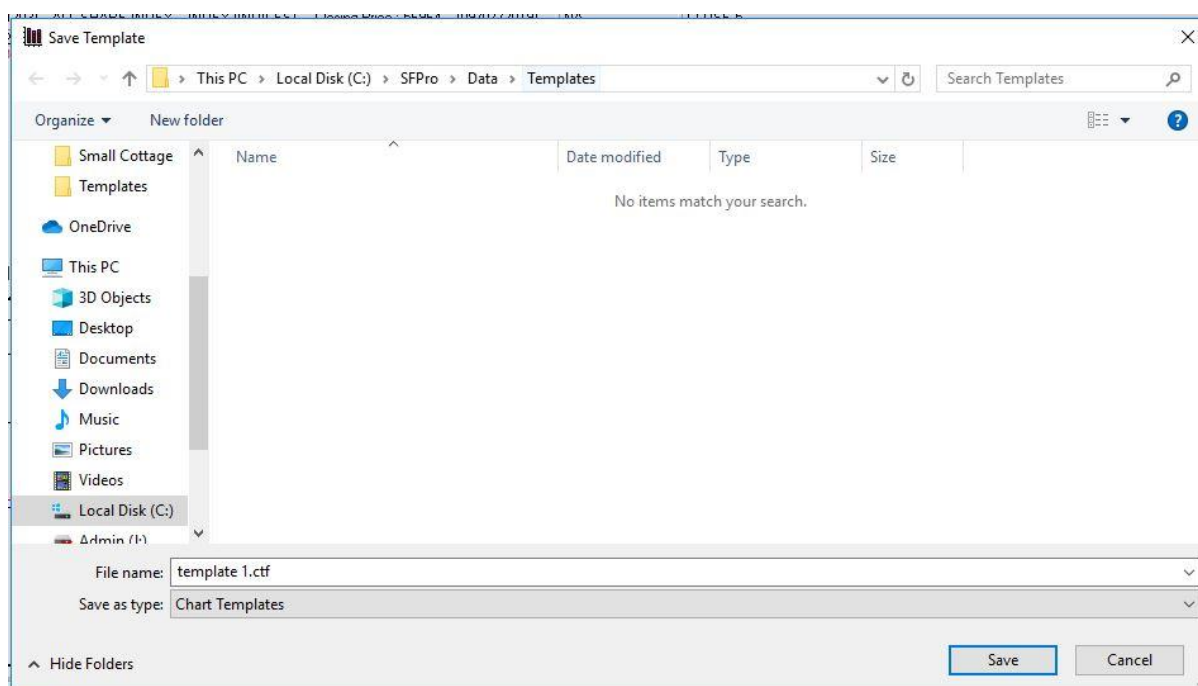
It is important to remember that any additional changes saved to the chart overwrite the default chart. Therefore, if you open a chart with the default template applied, make changes by adding and deleting indicators/add-ons and trendlines etc., close the chart and click on save, when opening this chart again, it will open as it was when you saved it – without the default template.

If at this point, you want the default template on your chart once more, you can apply it once again by clicking on File in the top left corner of the screen, then on Templates, then on Apply Default Template. This will remove everything on the chart and add the default template. If you do not save the chart at this point, the saved functions will still be there when opening the chart again.

To remove the saved default template, click on File in the top left corner of your software, then on Templates, then on Clear Current Default Template. This deletes the default template entirely so make sure to have it saved as a template in your software before deleting it.

You may save multiple templates within your software, each with a different name and different parameters. You can then apply these as and when you need them to any chart.

To do this, add the indicators and add-ons you wish to save, click on File in the top left corner, then on Templates, then on Save Template As... Then choose a name for the template and click on Save.



To apply a saved template to a chart, open the chart you wish to add the template to, click on File in the top left corner of your software, Templates and then Apply Saved Templates. The folder with all your templates will then appear. Choose the template you want and click on Open.

If you save the chart now with the applied template, it will open with this template when opening the chart again at a later stage.

Whatever you save to the chart when closing it overwrites any default template in place.

To make changes to the saved template, add/delete the indicators or add-ons on the chart, click on File in the top left corner of the software, then on Templates, then Save Template. This will automatically include any changes made to the saved template in the templates folder in your software.

Layouts

The difference between a layout and a template is that a layout refers to a number of charts, saved in a certain way on your screen, which you can apply at any time.

This works in much the same way as the templates feature explained above.

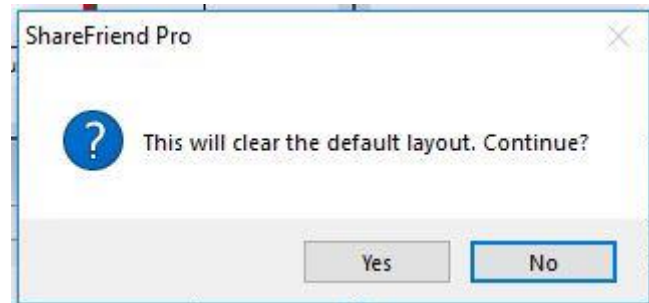


To save a default layout, open all the charts which you would like to save, arrange them within your software as you would like them to open, then click on File in the top left corner of your software, then on Layouts, then on Save As Default Layout.



When you open your software again, this layout will automatically open on your screen.

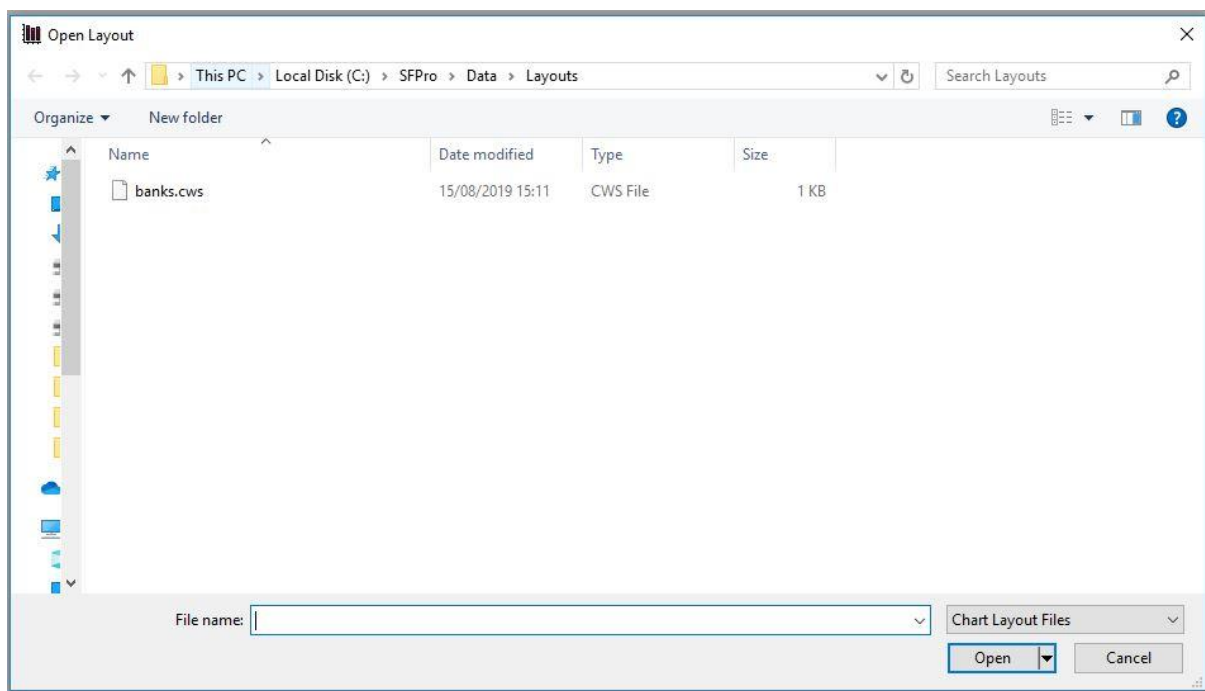
If you would like to clear this layout, click on File in the top left corner of the screen, then on Layouts, then on Clear Current Default Layout.



A box will appear asking if you would like to continue, click on Yes. The next time your software opens your layout will not open automatically.

Just like with the templates, you may save multiple layouts. You may want a bank layout, a mining layout or a retail layout. Add the charts to your software, arrange in the order you would prefer on your screen and then click on File in the top left corner, then on Layouts, then on Save Layout as. Type a layout name and click on Save.

To apply that layout to the software, click on File in the top left corner of your software, then on Layouts, then on Open Saved Layout.



Click on the layout you would like and then on Open.



The layout you selected will now open on your screen.

If any changes are made to this layout and you would like to save these, simply click on File in the top left corner, then on Layouts, then on Save Layout. The next time your layout is applied, the changes will be included.

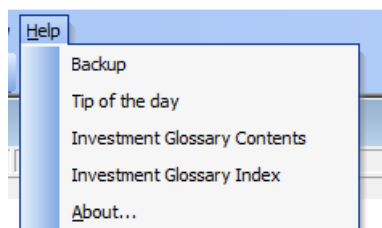
Backup and Restore

A Backup/Restore option is available in the program. This enables you to backup all your personal settings such your templates, layouts, portfolios, shares stored in your Favourites folder and Watchlists.

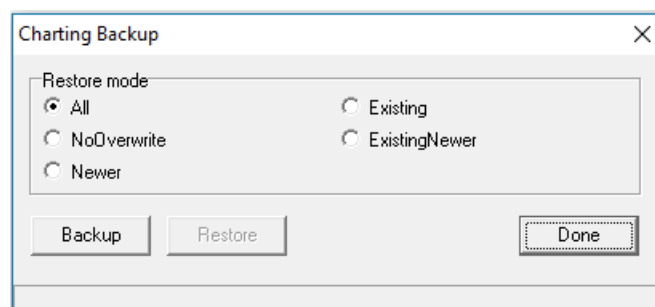
If you ever need to re-install your program you should first do the backup and after you have re-installed it, use the Restore option of the Backup feature to restore all your personal settings.

It is a great feature that can be found in the Help menu and it is recommended that you use it every time you add personal settings to your program.

1. First click on the Help menu item:



2. Then click on Backup.
3. Then a box will appear with various options:



4. Select how you would like to backup your latest changes and then click on Done.

Fundamental Information

Company Information

A major feature of this program is that it also has a large amount of company financial and other important information that is updated regularly.

In this part of the program you will find important information such as:

1. An **Overview** provides information on the share, such as performance figures, major shareholders, statistics, dividend announcements, nature of business, brand names and our analyst's views on the company.
2. Detailed information on the company by way of **Comments** – this includes the nature of the business, directors, brand names, major shareholders, and financial figures going back 10 years.
3. Stock Exchange News Services (**SENS**) – this is a list of the latest SENS announcements by the company.
4. **Financials** shows a graphical presentation of the turnover, profit after tax, total liabilities and cashflow going back 5 years.
5. **Yields** shows a graphical presentation of earnings per share, dividends per share, headline earnings per share, net asset value.
6. **Ratios** – here you will see the various financial ratios presented in graphical format, including the current ratio, debt/equity ratio, interest cover, dividend cover, return on assets, and return on equity.
7. The **Annual Growth** shows a history of financial figures going back 10 years and percentage figures such as the price, HEPS, EPS, DPS and the NAV.
8. **Directors Dealings** includes the latest director share purchases and sales.
9. Lastly, a direct link to the **Company's Website** is provided.

Information - SANTAM

OVERVIEW COMMENTS SENS FINANCIALS YIELDS RATIOS ANNUAL GROWTH DIRECTOR'S DEALS COMPANY WEB SITE

Short Name	Long Name	Ticker	Close
SANTAM	SANTAM LTD	SNT	30529

Last Year End: 12

Sector: NONLIFE-INS

Market Segment: MID CAP

Market Cap: 35148

Avg 15 Day VOL: 67256

Price	Date
52 Week High	33000 2018/03/09
52 Week Low	24686 2017/10/25

Year	Price
2003	4,447
2004	6,143
2005	8,050
2006	8,745
2007	10,400
2008	7,930
2009	10,850
2010	13,050
2011	14,231
2012	19,025
2013	18,628
2014	21,500
2015	18,950
2016	23,400
2017	26,704

Shareholder	Percentage
Sanlam Ltd	58.77%
Government Employees Pension Fund	5.14%

Statistics:

DPS	DY	EPS	EY	NAV	P:E Ratio
	2.57	1511	6.06	6443.07	16.5

Dividends:

Declared On	LDT	Paid On	Amount
2018/08/30	2018/09/18	2018/09/25	363 ZARc

Nature of business:

Santam is a multinational general insurance group that writes insurance business in South African and Namibia and has investments and clients in a further 31 countries. It is the leading general insurer in South Africa with a market share of more than 22%. The group provides a diversified range of general insurance products and services through a network of 2,700 intermediaries and direct channels. The group boasts more than 1 million policyholders, ranging from individuals to commercial and specialist busi

Brand Names:

Santam,

This type of information is essential if you are investing for the long term and are looking for highly rated or upcoming companies.

Our approach to showing fundamental information is significantly different from the usual reporting style used. Instead of showing rows and rows of boring and often difficult to read or absorb information, all fundamental information as well as yields and ratios shown in the program are in graphical format.

It is well known fact that “a picture is worth a thousand words” and by looking at 5 years of annual data in bar graph format you will immediately be able to obtain a clear view of a company’s performance

Financial information can easily overwhelm a person, especially those without an accounting background or training. In recognition of this fact, we have extracted only the most important financial figures from a company's year-end results and included these in the program.

As with most other regularly used features, financial and other company information can be found in 2 ways.

You can do so by choosing the "Company Information" menu item or you can use the right mouse click to call up the Quick Access menu and select the Company Information.

The Company Information section of the program contains an exceptional amount of valuable and very useful information on all companies. Therefore, users are well advised to refer to this section of the program before buying or selling shares.

Company Websites

Additional, and very useful, company information can also be obtained by visiting companies websites. Most companies publish a lot of information about their operation often with a complete set of their recently published financial results on their website.

A great and useful feature of this program is that the web addresses of most companies are already stored in the program and, provided you are connected to the internet, you can visit a company's website with little or no effort.

To use this feature first make sure that you are connected to the internet.

Next call up the share you are interested in and with the graph of the share on your screen select the "Company Information" menu and thereafter Company Website.

Alternatively, can you click on the  icon in the toolbar below the menu bar.


If the company has a website, clicking on this icon will take you directly to the site and on closing the website you will be returned to the Company Information screen.

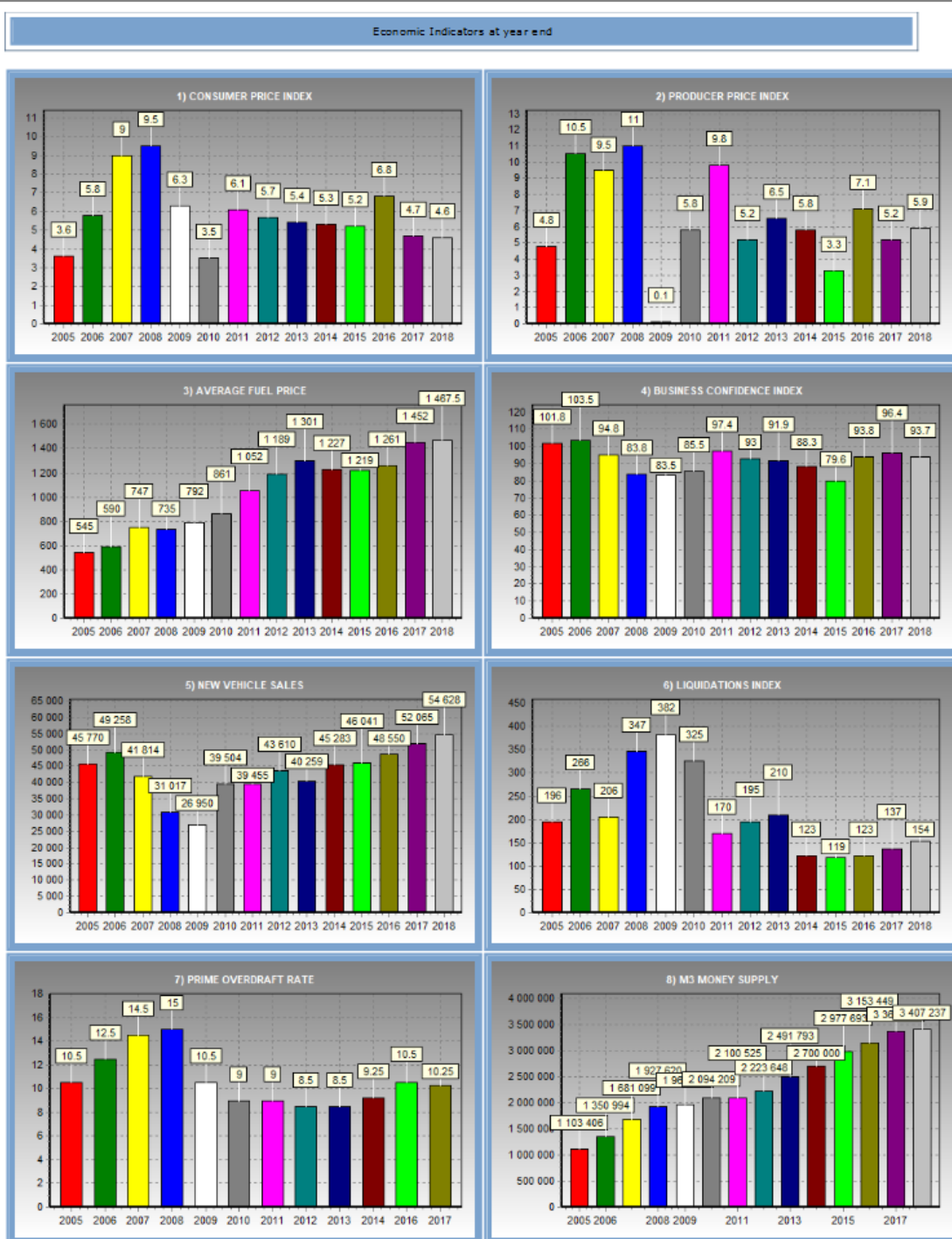
Economic Indicators

Included in the program, economic indicators can be a great help and useful tool to evaluate the market.

The program includes a graphical representation of the most important and frequently referred to indicators such as the CPI, PPI etc.

To view these, select the “Economic Indicators” tab from the menu bar.


 Economic Indicators

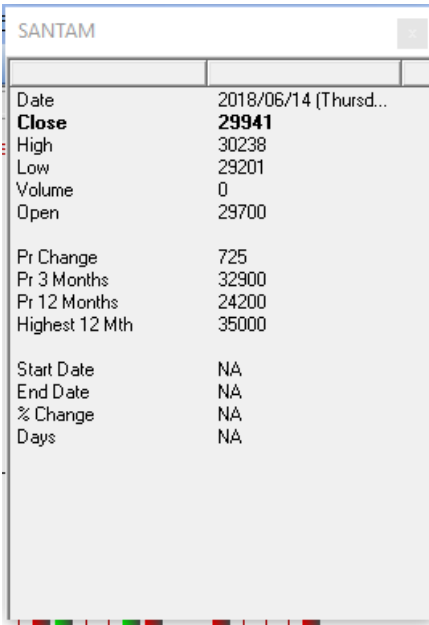


Data Window

The Data Window is used to see a detailed view of a share's prices at a specific date.

It is not an analysis tool but it is an informative feature of the program that is very useful to establish the entire range of daily price movements and percentage changes of the price over different time periods.

To load the Data Window, click on this icon  in the Tool Bar or you can activate it from the View icon in your menu or from the Easy Access menu (right click on your chart).



SANTAM	
Date	2018/06/14 (Thursd...
Close	29941
High	30238
Low	29201
Volume	0
Open	29700
Pr Change	725
Pr 3 Months	32900
Pr 12 Months	24200
Highest 12 Mth	35000
Start Date	NA
End Date	NA
% Change	NA
Days	NA

A useful feature of the Data Window is the ability to see the percentage price change over any pre-set time period.

In order to see this in action, with a graph on the screen, activate the Data Window.

When the Data Window is shown move the mouse pointer to any position on the graph and click the left mouse button. This draws a fixed vertical line on the graph.

With the vertical line on your screen watch the bottom 4 lines of the Data Window.



The first line shows “Start Date”. This is the date on which the fixed vertical line is drawn.

The second line shows “End Date”. This is the data point below the mouse pointer.

You will notice that date changes as you move the mouse further from or closer to the vertical line.

The third line is the “% Change”. This is the percentage increase or decrease in the share price measured from the date on which fixed vertical line is positioned to wherever the mouse pointer is.

The last line is called “Days” and indicates the number days elapsed between the date of the fixed vertical line and the date directly where the mouse pointer is on your screen.

Once a vertical line is on the screen it can be moved to any other position by placing the mouse pointer on a different date and clicking the left mouse button once.

Removing the Data Window

The Data Window can be closed in the traditional way by clicking on the small X at the top right hand corner of the window or by clicking the right mouse button.

Another quick way to remove the data window is to press the Esc key on your keyboard.

Watchlist

A Watchlist is yet another useful feature of the program. It is used to, as the name says, place a “watch” on any share or shares you may like to keep an eye on.

For instance, you can add a share to a Watchlist if you wish to be alerted when a share price falls below a pre-set low price or rises above a predetermined closing price.

Once shares have been entered into a Watchlist, the computer will alert you every time you start the program when the share price meets or breaks through the high or low figures set for the share.

While this feature can be used as a stop loss alerting mechanism it is not recommended that you use it for this purpose as it is far better to use the “Trailing Stop Loss” feature built-in the Portfolio Manager.

Watchlists can be used for a number of purposes but the main use is to be reminded when a share price reaches a high or a low price.

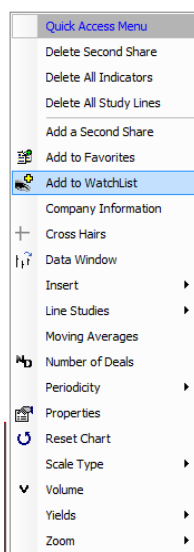
High or low prices attributed to a share can either be calculated automatically by the program or can be set by the user.

For example, you may wish to keep your eye on a specific share or a number of shares but you feel that the price is too high.

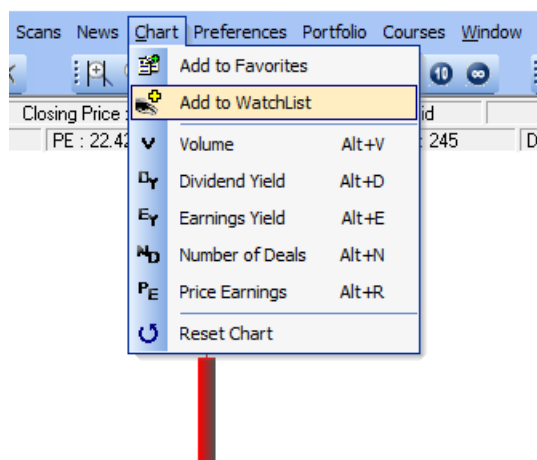
Adding a Share

You can automatically add the share, or shares, to your Watchlist.


1. First bring the share to the screen and once it is on your screen you can add it to your Watchlist by activating the Quick Access menu (right mouse click) and select “Add to Watchlist”.



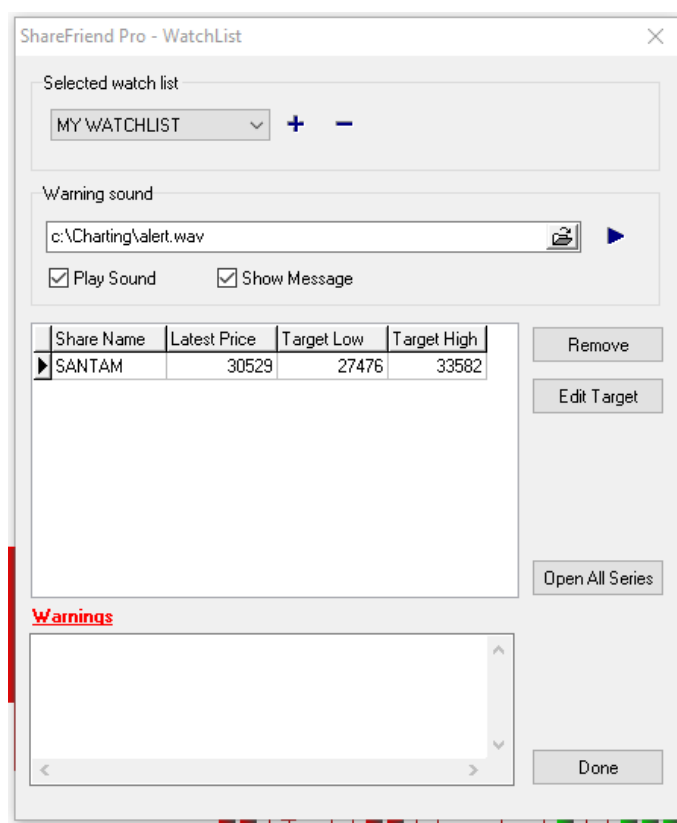
- Alternatively you can select the “Chart” icon in your menu bar and select the “Add to Watchlist” option.



On clicking the Add to Watchlist option, you be asked which Watchlist to add the share to, and will then receive a screen message telling you that the share has been added to the Watchlist.

To view your Watchlist you can click on the Watchlist icon in your tool bar, which looks like this .

Or you can click on the View icon in your menu bar and select “Watchlist”.



Opening All Shares

If you have a number of shares included in your Watchlist, you can instruct the program to simultaneously load all of them automatically by clicking on the “Opening All Series” button in your Watchlist.

The program allows you to create several Watchlists. The first Watchlist already provided in the program is the **Default** Watchlist and is named as such. If you wish to create additional Watchlists you can do so by clicking on the **+** button on the Watchlist screen and enter a name for the additional Watchlist you wish to create.

Similarly clicking the minus button allows you to delete an entire Watchlist.

Viewing All Shares in a Watchlist

Select the “View” icon in your menu and click on Watchlist.

With the Watchlist screen shown you can do a number of things.

Firstly you will see that there are a number of items you can select or change.

By placing a tick next to Play Sound only and/or Show message you can instruct the computer to alert you whenever a share falls below or rises above the values set in the Target Low or Target High columns.

These values are calculated according to the default percentages set in the “Target Settings” blocks. Targets percentages can be changed by overtyping the default values.

The low or high target values can also be changed manually by entering new values and pressing the enter key to save them followed by clicking the “Done” button at the bottom of the screen.

Whenever a share reaches either of the 2 targets the computer will warn you of this event on starting the program and thereafter every time you call up a share included in the Watchlist.

Deleting a Share from the Watchlist

Once your Watchlist is open, click on the share to make the entry active and then click on “Delete Series”.

Portfolio Manager

The portfolio manager is used to record all purchases and sales of shares and it can be used to keep a record of cash transactions and cash balances.

It is an integral part of the program, meaning that as the program is updated the prices of shares recorded in the portfolio manager are also automatically updated.

You can create as many portfolios as you like. For instance if you have speculative and long term investment shares you may like to open a speculative portfolio for your speculative shares and another portfolio for your long term investment shares or you can open separate portfolios for your family members.

Before you can use the portfolio manager you first need to create a portfolio.

1. Click **Portfolio** on the menu bar and select **Portfolio Manager**.
2. Click the **New** button at the bottom of the screen.
3. Enter a name for the Portfolio (you can give it any name you like).

The first time you create a Portfolio the top (black) portion of the portfolio screen shows zero values in the columns headed by Share holdings and Cash Position

As you conduct transactions these columns will be populated with values.

Open Positions (OP)

The term **Open Positions at Cost** means the total value of all shares that you are still holding at the price including brokerage you originally paid for them. It does not include the value of shares that you have sold.

The **Current Value** column shows the value of your shares as at the last date you did a download. The Unrealised Gain/Loss indicates the difference between the **Purchased Value** and the **Current Value** of the total portfolio.

The **% Gain/Loss** figure shows the increase or decrease in your portfolio value.

Cash Position

The Portfolio Manager can also keep track of money you have deposited with your broker when you opened a stock broker's trading account.

Once you have entered the amount deposited in the portfolio manager it will show in the top right corner of the portfolio manager next to **Total Deposits**.

This figure will change as and when you purchase or sell shares and do any transactions involving cash.

Transactions

After creating a new portfolio, and before you can start using your newly created portfolio, you first need to enter your transactions such as cash deposited with your broker(s) and shares purchases.

Click on the **Transactions** tab and thereafter click on **New Transaction** at the bottom of the screen.

A window with 9 different options will open asking you to **Create** a new transaction.

By placing a dot next to any of the options you can do any of the following:

- **Buy** – is used to record share purchases.
- **Sell** – is used to record the sale of shares.
- **Deposit** – when you deposit money with your broker use this option to record this transaction.
- **Withdrawal** – this option is used whenever you reduce the amount of cash you have on deposit at your stockbroker.
- **Dividend** – many, but not all, shares pay dividends either once or more frequently per year. These dividends are normally paid by the company to your stockbroker who will add the cash value of the dividend to your cash on deposit. You can use this option to record the value of these payments.
- **Interest** – Some companies pay interest and your broker also pays you an interest on the money they hold for you on deposit. To keep track of these payments you can select the **Interest** option.
- **Take on & Take off** – These options are useful if you are already holding an investment in shares and you want to include these shares in your portfolio or if you need to make an adjustment to an existing holding.
- **Sundry** – this option will seldom be used but is provided to make changes to a portfolio.

After selecting one of the above options, you need to select a share name.

1. Click the **Select a Share** button to open the **Select a Share** window.
2. Start typing the name of the share you wish to enter in your portfolio and once the share name is highlighted double click on the name.
3. Next click on the **Transaction Date** button and enter the date of purchase or sale of shares.

The next entry you need to make is to record the number of shares you purchased or sold.

The program automatically enters the share price in cents as it was on the transaction date. This may not be the price you paid or received when you bought or sold the share. Check this against the broker's note you received for the transaction and enter the correct price by overtyping the value shown.

Do remember that all values are recorded in cents.

In the next field you need to enter the **Broker's Charges** as per your brokers note.

Once these entries have been made, click the **Save** button to record the transaction.

The **Delete Transaction** or **Edit Transaction** buttons are provided to make corrections in a portfolio. To use any of these options first highlight the transaction you wish to change and thereafter select any of the 2 buttons mentioned.

In the Transaction window you can also add Notes about your purchases or sales by clicking on the **Transaction Notes** button.

Holdings

This shows the status of each share in your portfolio and it also allows you to Delete a Holding, Edit Stoploss figures and add or change Notes. And by placing your cursor on a particular share name you can call up the Company Information screen of that share by selecting the Holdings Info option.

Maintaining a stop loss on shares is an important part of investing and to fully understand this concept you can refer to the PDSnet Online Course. Please visit our website for more info of this course and how to sign up – www.pdsnet.co.za

The small **Red** block at the bottom of the screen is merely indicative and is used to show whenever a share included in the portfolio has been de-listed.

JSE Over Performance Graph

Once you have created a portfolio and entered some shares, the JSE Performance graph will be populated and shows the performance of the JSE Overall index in percentage terms measured from the first date that you purchased a share.

By comparing the percentage figure above the graph with the Percentage Gain/Loss % in the Share Holding column you can quickly see if your portfolio is out or underperforming the JSE Overall Index.

Reports

A number of useful self-explanatory reports about your holding are available under the **Reports** menu.

File

The **File** menu also has a few nice options, the most useful of these are **Password** and the 2 **Exporting** features.

Password

This option allows you to set a password on a portfolio so that only you can make entries in, or view, your portfolio.

As with all passwords you must make sure that you remember the password you used. If you forget it we are not able to assist you in opening your portfolios for you.

Export

This option is provided to export one or all portfolios to a CSV file and thereafter view your data in Excel format.

This feature also enables you to give a copy of your portfolio transactions to your accountant for tax declaration purposes.

Showing a Graph of a Share in a Portfolio

You can call up a graph of any share included in your portfolio.

To do so place your mouse tip on the share name and right click on the name. Select the very first option in the pull down menu called "Chart". When clicking on this a graph will immediately appear of the selected share on your monitor.

Simulation

The **Simulation** option is provided as a learning tool for “paper trading”.

If you are new to stock market trading it is recommended that you initially use the **Simulation Portfolio** to record fictitious purchases and sales of shares **before getting your feet wet**.

The simulation portfolio starts with a “paper” cash balance of R100000 and whenever you make entries in this portfolio the cash balance will automatically be adjusted.

You can start a simulation by clicking on **Portfolio** in your menu bar, clicking on **Simulation**, and then **Load Simulation** or **Restart Simulation** depending on whether you have done one before.

Use this important learning tool to see how your trading decisions would have performed if you had actually bought and sold shares with real money.

Should your initial paper investments and paper sales show that you would have lost money instead of making money you should re-evaluate your trading strategy or otherwise sign up for the PDSnet Online Course. Please refer to our website for details on this – www.pdsnet.co.za

A new simulation can be started at any time by clicking the **Restart Simulation** button.

Other Useful Tools

The program comes with a number of other very useful features not described so far in this “Getting Started” manual.

They are however very significant tools that can assist you on a daily basis and it is important that you start using them as soon as possible.

The most important of these are:

- The **Market Scan** option that is found under the **Scans** menu. This program enables users to check the entire database for shares that meet specific conditions. It is a very powerful feature in so far that you are able to scan all, or a range of, shares on technical indicators as well as on fundamental parameters or both. We encourage you to use it frequently as it is a great help in quickly identifying those shares that one should concentrate on.
- The **Market Carpets** and the **Overall Market View** option in the **Scans** menu helps you in obtaining a quick overview of the performance of each sector and this is also an option that should be used frequently.
- If you invest or are interested in investing in Unit Trusts you should frequently refer to the **Unit Trust scan** as this scan will very quickly show you those Unit Trust that are out- or underperforming other funds.
- The last two other important and useful features are **Layouts** and **Templates**. Both of these can be found in the **File** menu and, if used regularly, will assist greatly in simplifying regular or frequent use of some of the many features included in the program.

The use of most of these features are explained in the Software Help videos found on the PDSnet website:

<http://www.pdsnet.co.za/index.php/help-videos/>

These provide a step-by-step explanation on the use of the many features of the program.

Another very good source on how to start using the program is to read the next sections specially written for us by Jean and Ben Temkin as these will give you a short, but practical, description on how best to use the program. Alternatively you can contact your Support Team on 011 622 6767 and set up an appointment for free face-to-face training on the software at our Bruma offices.

A Final Word and Tips to Get Started

Written by Ben and Jean Temkin

This section is written by the well-known author of stock market related books, Jean Temkin and edited by Ben Temkin, both of whom used to write regular columns in the Business Day and other financial publications.

Choosing a Share

This is a powerful software that, when used properly, will guide you towards the right shares to buy and when to buy them. Later it will warn you when it is time to sell them.

Without knowing anything at all about any listed company, you can hone in on your search by first looking at the sectors of the economy that are currently at the best or their worst.

Choosing a Sector

Like the share market itself, the various groups and sectors, as well as shares move in cycles. Each major cycle is made up from several minor cycles. The optimum time to buy is when it is recovering from a cycle low, and the best time to sell is when it has begun moving down from a cycle high. Long-term investors would concentrate only upon major cycles and short-term investors on both major and minor cycles. But without the use of technical analysis it is impossible to spot when a sector's cycle has started to change.

This program offers several powerful scanning tools that take you by the hand and lead you to profitable decision making.

Overall Market View Scan

The Overall Market View scanning tool gives you a bird's-eye view of where each sector of the market is currently standing and leaves you in no doubt where each sector is in relation to the market as a whole. Each sector is presented in bar form in colours ranging from deep green (gain) to deep red (loss), with the length of the bar indicating percentage gains and losses. You can choose between price performance and up-days vs down-days. A trader may only be interested in comparing today with yesterday, but for serious investors, the comparisons offered increase from weeks, through months to even years.

A second box will list the top five and the bottom five sectors. As you move the cursor across the bars, a line chart of the sector appears in a box. Take particular

note of the short bars at the start of the green half, as these sectors may have only just turned positive, and may be signalling the start of an uptrend. Alternatively they may show the resumption of a previous upward trend. This you will see on the accompanying line chart.

Market Carpets

The next tool is Market Carpets. This scan also allows you to choose a time period and price performance of up-days vs down-days and range from deep green to deep red.

Each carpet contains smaller coloured boxes identifying the various shares quoted in that sector. The cursor placed on the main box will throw up a chart of the sector or in if the cursor is placed over one of the smaller boxes a chart of the share. Some of the green boxes may contain some red smaller squares and red squares may show some smaller green squares. In these cases, the share is moving against the general trend of the sector.

While some bargains may be picked up from green smaller boxes within a red square, apart from when something unusual is happening rarely does a share conflict with the general trend of the sector for any length of time.

Market Scan

You still haven't found a share but have selected a sector or sectors which are in a favourable cycle. Using the Market Scan you can begin by doing some individual scans based on technical indicators only.

In charting we use technical indicators as measuring tools and, with a few exceptions, unless you apply an indicator, all you'll see is what has happened, while what you need to know is what is likely to happen. You need to judge whether a slight up-flip or down-flip in price signals a reversal, or a minor correction, but to do this you need some kind of measuring tool. Specific sets of circumstances require specific indicators and depending on whether you are investing for the short or the long term, the time element needs to be flexible. This program provides you with the necessary indicators, each of which can be altered to suit your individual investment requirements.

Having watched the training video, you will be aware of the various indicators and the drop-down envelope that appears when you choose an indicator gives you an interpretation of that indicator. Long-time users of charting programs will already know which indicators work best for them. New users need to test indicators to find out which they are most comfortable with and feel they are the most trustworthy.

Having chosen your preferred indicators, the scan allows you to group your preferred indicators to scan the market.

Unit Trust Scan

The Unit Trust scan is very similar to the Market Scan but it is specifically aimed at unit trust investors. This scan enables you to check on the performance of each of the Unit Trust companies and you can also quickly establish which of the categories of unit trusts are performing better or worse than others.

To check the performance of these investment vehicles you should select the Unit Trust Overview scan and by clicking the Select button you can indicate which categories you wish to include in the scan report. Clicking on any of the column headings sorts the data in the column in ascending or descending sequence.

A useful scan to check on the recent performance of unit trust companies is the Moving Average Crossover scan as it quickly identifies those unit trusts with a positive or negative moving average.

Technical Analysis Scans

Bearing in mind that no two shares are identical, and no set criterion will apply to every share, in the past I have been wary of scans, as most lump all the indicator criteria together, and rarely does more than a handful of shares exactly match your aspirations. When I was asked to write this guide, I doubted that it would be any different. But it is, because while scanning the criteria as a whole, it gives you an individual reading of each of the criteria you have chosen.

With your preferred indicators in mind, you can conduct a scan of the whole market or a selection of those sectors that most interest you. For example, as I am a serious investor in ordinary shares only, I deselect Unit Trusts, Preference Shares, Warrants and Futures by clicking on the “Add Market Only” button below the Sectors Selection window. You may only want to scan the shares that you have in your portfolio and those in which you have a particular interest. For this you check ‘all my items’ Still with preferred sectors in mind, an initial interesting scan is the Market Overview scan that presents you with a report showing from one day to five years, how each share has performed. Click the sector heading and take note how shares in your preferred sectors have performed. There are many other options that can be chosen, some dealing with technicals and some with fundamentals. Which of these you select depends on what kind of investor you are.

I tick the highly liquid and liquid shares as I believe that investment in low tradability shares can lead you into traps. A trader or short-term investor would not be interested in earnings and dividend yield range, but longer-term investors would find these essential.

Most investors are interested in unusual percentage price and volume changes over a chosen time span. Rather than price, volume changes signal that something is happening. Typically there is a pick up in volume when something is afoot. There can be the blow-off phase at the top of a cycle, but more often it comes when the share is ready to recover following a fall.

The speculator out to buy as many shares as possible would be interested in Price Range, while the longer-term investor is aware that shares can be bought in batches less than 100, and fewer of a blue chip company is more beneficial than lots of a speculative share. The longer-term investor would certainly be interested in Consistent Increase in Cash-flow and Profit simultaneously while the speculator would not.

Other results, for example Moving Average crossover will appear as True under either the Bullish or Bearish column. Items such as the Percentage Increase in Volume will appear as a table setting out the Average Volume, the Actual Volume and the Percentage change.

You are given the opportunity of selecting six indicators for your scan. You have an option of time periods for the indicators, a day, a week a month, three months or six months. A trader would almost certainly use a day, while a longer term investor might choose months. I prefer to use weeks.

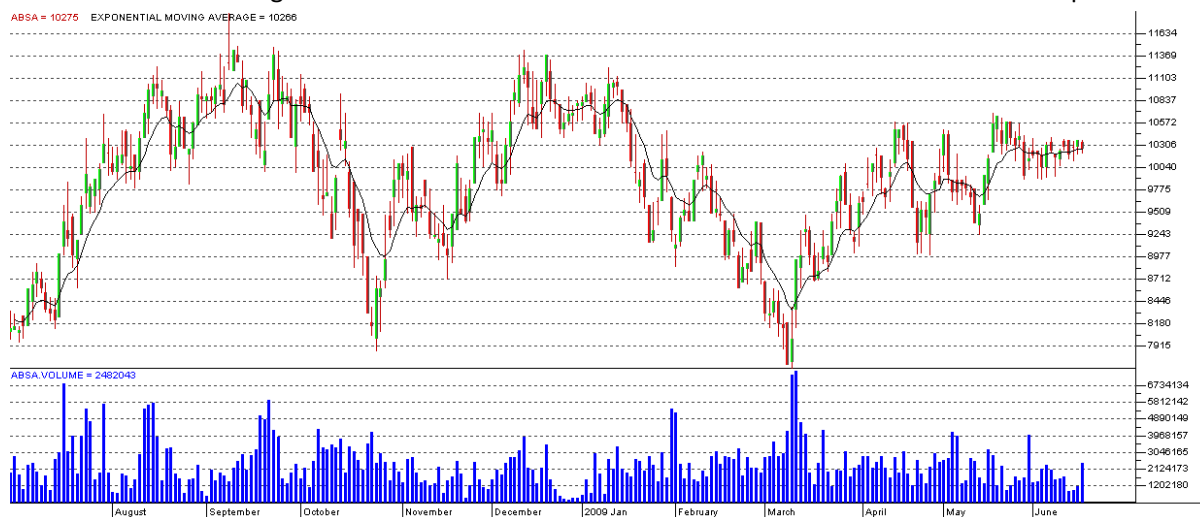
The ideal set indicator scan results will all appear as 'True' in each technical scan column. The blanks indicate that the share did not meet your criterion for that particular share, but matched some of your other criterion and therefore should not be ignored.

My preferred scan indicators consist of a mix of indicators and other tools, some of which complement each other.

Moving Average

A Moving Average flattens out a price plotting, so removing unimportant volatility in a share's price, better showing the direction in which the share is moving. There is a choice of between 5 moving average types in your software, of which a simple or an exponential moving average are preferred (please refer to the PDSnet Online Course for an explanation of the different types of moving average). The simple moving average merely adds up all the prices over a selected period and divides them by that period to arrive at a plotting point. The exponential moving average gives a greater weighting to the most recent information. I prefer to use an exponential moving average.

In the chart of Absa on the next page, you can see that initially while the price is highly volatile, the 10-day moving average moves in line with the share's general direction in a much more orderly fashion. At the same times it leaves you in no doubt about the general direction of the share, as they are made up from the sum of the prices over the given period moving averages lag the price. But by using an exponential moving average, where the greatest weight is given to the most recent information, the lagging period is reduced.

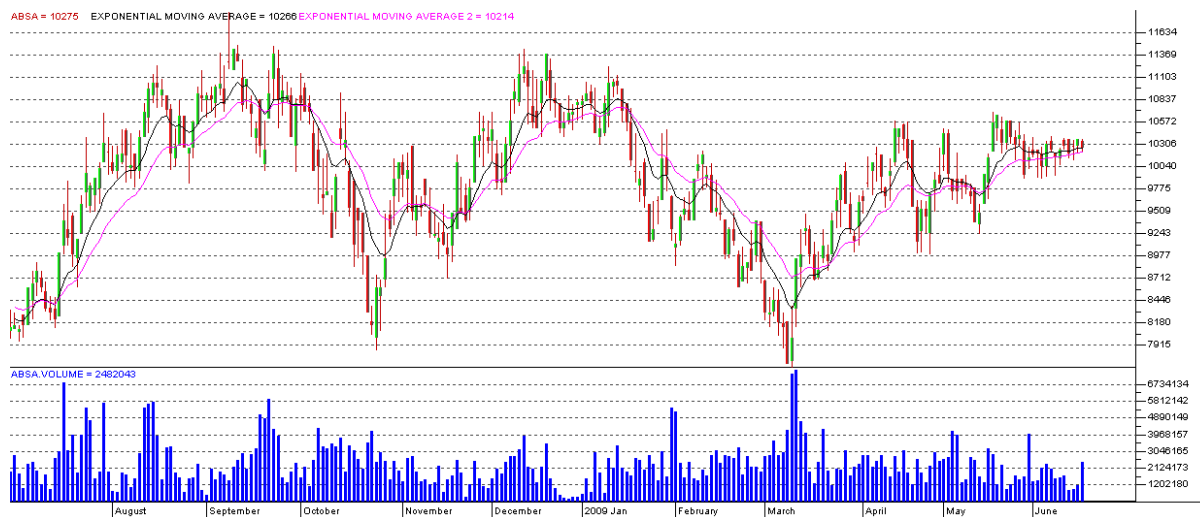


The Moving Average Crossover

The Moving Average Crossover is an extremely valuable tool offered by the scan.

But which length moving averages you choose depends on whether you are a trader, a short term investor or a long-term investor. Bear in mind that the shorter period chosen, the more unreliable the signal. A trader might use a low cross-over for example five and 10, while a long-term investor might choose a high 50 and 100. As recent crossovers are the most significant, sorting by date is preferable.

Referring to the Absa chart again, but this time using the moving average crossover:

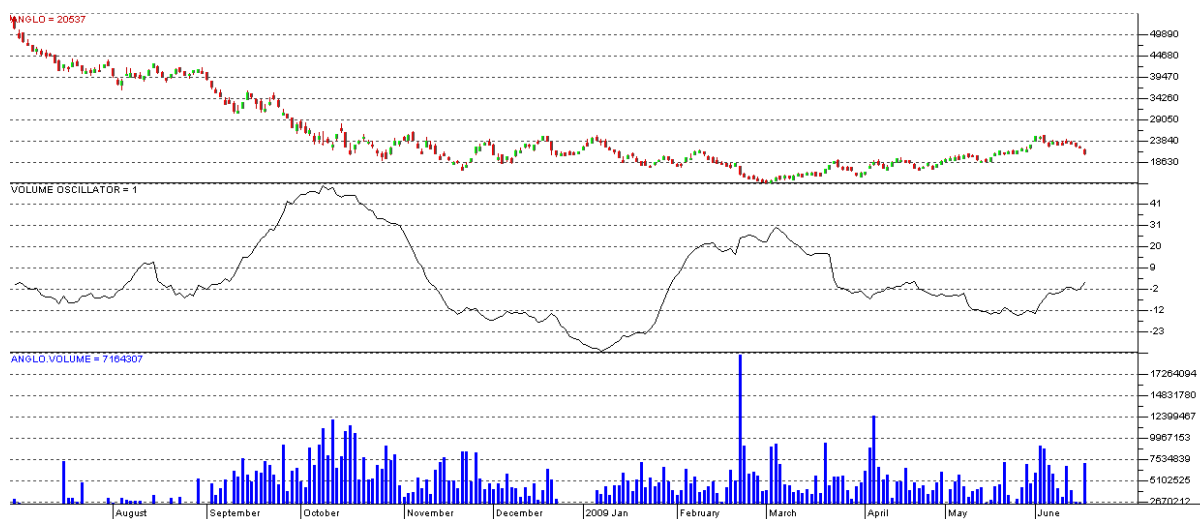


When one moving average crossed another you received confirmation that the share had changed its trend. I have added a 20-day moving average shown in pink. You'll see that ahead of a major fall, the longer term moves down through the shorter term moving average and ahead of a major rise, the shorter-term moving average moves up through the longer-term moving average.

The results of the Cross-Over scan will list the date of the cross-over – the more recent the cross-over the more important the signal.

Unusual Percentage Volume

Volume plays a major role in honing in on the shares that warrant further investigation even if that share does not meet up with your other criterion.

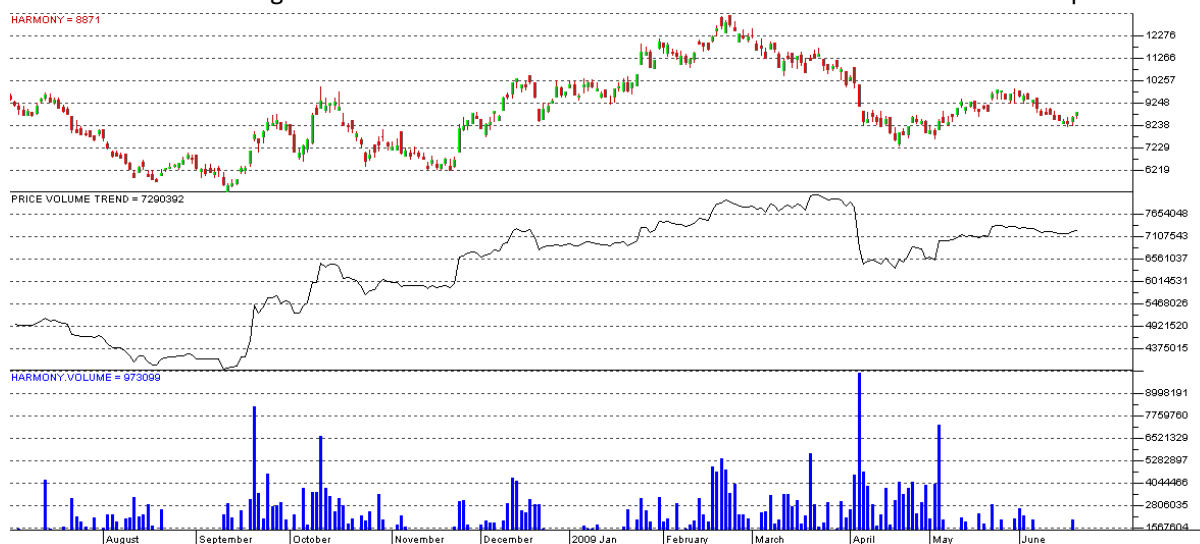


I've used a chart of Anglo to demonstrate the importance of volume. The volume plotting at the foot of the chart picks out actual volume. There was a pick-up in volume in September and the start of October, when the share price was falling – investors were off-loading shares. But the February and April spikes would have prompted you to seek the reason and the best way to search is using SENS. In this case it could have been the introduction of a plan whereby employees could buy share with deductions from their salaries. The early April spike may have been linked to Director's Dealings and a share incentive plan. As neither of these did much for the share price, these spikes could be ignored. Had they been take-overs, mergers or the like, the share price would have responded.

I have included a Volume Oscillator in the chart as using two volume-dictated moving averages it cuts out irrelevant volume information. In line form it shows the build-up and waning interest in a share. You will note that in January, the oscillator began to turn upwards while the share price was still falling. This signalled that more investors were being attracted to share by its perceived bargain price.

Price Volume Trend

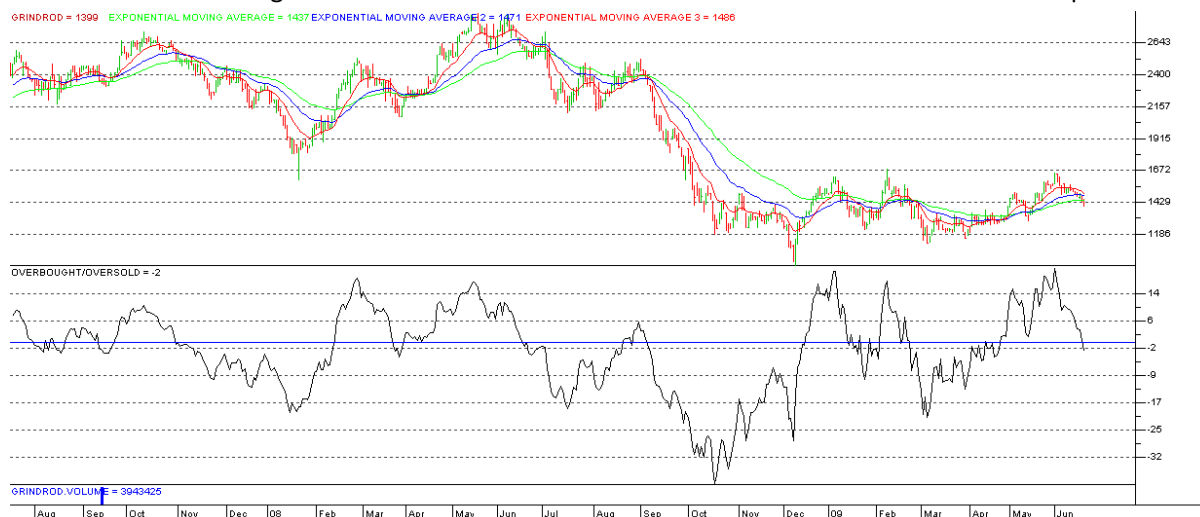
Combining both price and volume, I find the price volume plotting of greater importance than the on balance volume (OBV) plotting. While the two plottings are similar, the addition of price adds weight to the plotting. When both price and volume are moving upwards, you know that the share is in demand, and when moving downwards, it is in supply.



The upper chart shows Harmony's price and the lower chart the volume. The centre plotting of the price volume trend shows at a glance what an increase in volume was caused by. It may have been an unusual number of sellers putting the share in supply, or an unusual number of buyers putting it in demand. The September volume increase was caused by buyers, the April increase by sellers and the May increase buyers. Each of the plottings of these moves was accompanied by the percentage price change.

Overbought/Oversold

The Overbought/Oversold (OB/OS) indicator is a valuable tool for detecting where a share is in relation to its cycle. As long-term cycles consist of several short term cycles, the period you choose can be lengthened to pick up its position within a long-term cycle or shortened to pick up the short-term cycle. When a share is overbought, it is likely to ease back, and when oversold, to recover.



I have used a two years chart of Grindrod to illustrate when the share has been overbought or oversold. To the upper chart, price, I have added three moving averages, that clearly pick out the trend changes. A bull trend is confirmed when the stacking order of the moving averages are short-term, above medium-term above long-term.

As no two shares are alike there can be no set level at which a share is said to be overbought or oversold. For Grindrod, the overbought level is 14+. I'd set the normal oversold level at 17- but as you see at one stage it reached 32- making it extremely oversold. This occurred in October, but the share did not reach its lowest point until December. This time lag was exceptional, but as it uses a moving average, often the OB/OS high or low plotting is slightly ahead of the price plotting. The chart is bisected at the zero line – above which is overbought territory, and below which is oversold territory. The zero line has a default 50 period simple moving average, which can be changed to suit your strategy.

While conventional moving averages zig-zag, this one is flattened and the OB/OS plotting shows the percentage difference between the price and the moving average.

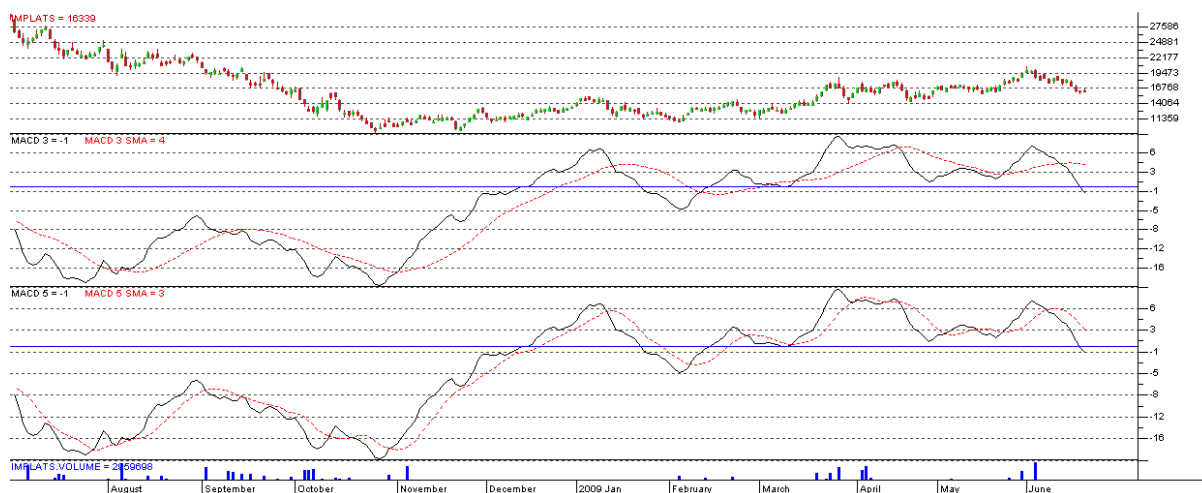
Your aim is to buy when a share is oversold and sell when overbought. When in doubt, lay a short-term moving average over the OB/OS plotting and wait for this moving average to be broken.

For more information on how the OB/OS is calculated refer to the PDSnet Online Course. For more information on this course and how to register, please visit our website – www.pdsnet.co.za

MACD

Consisting of two moving averages the Moving Average Convergence/Divergence (MACD) indicator frequently picks up buy and sell signals. The default signal line is 9-period but depending on whether you are a trader, a short-term or long-term investor, this period can be adjusted. Like all indicators, the shorter the period used, the more speculative the signal. When the MACD crosses downwards through the

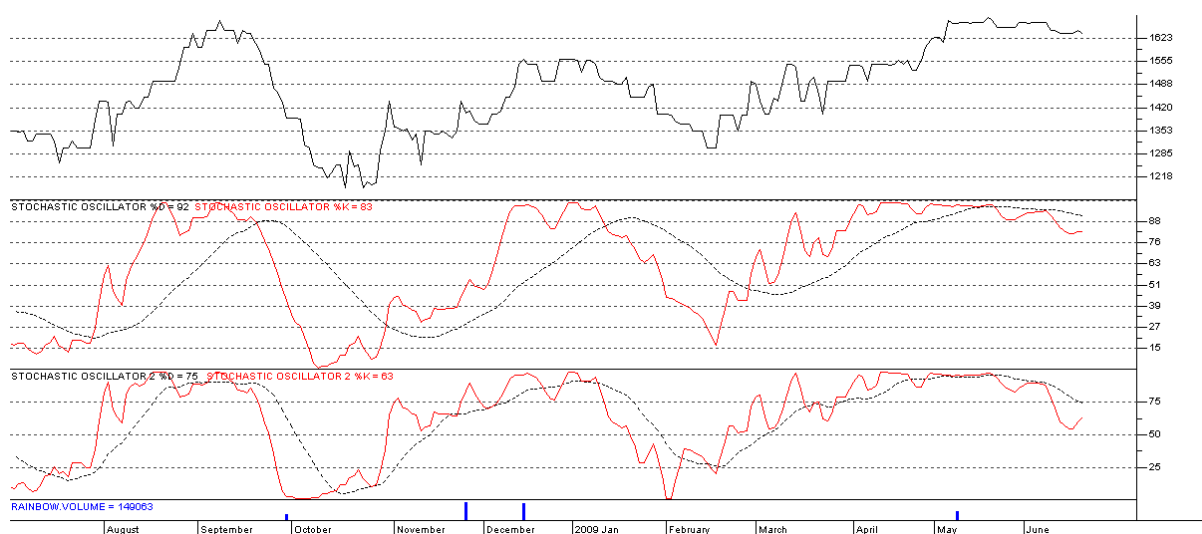
signal line, we have a sell signal, and when it crosses upwards, a buy signal. The position of the MACD in relation to the horizontal line indicates whether a share is overbought or oversold.



I have use Implats to show the working of the MACD. The middle plotting is the MACD with a 20 period and the lower plotting has a 9 period. The shorter plotting obviously threw up more signals, but the upper plotting prevented some potentially unprofitable trades as in October and May.

Stochastic Oscillator

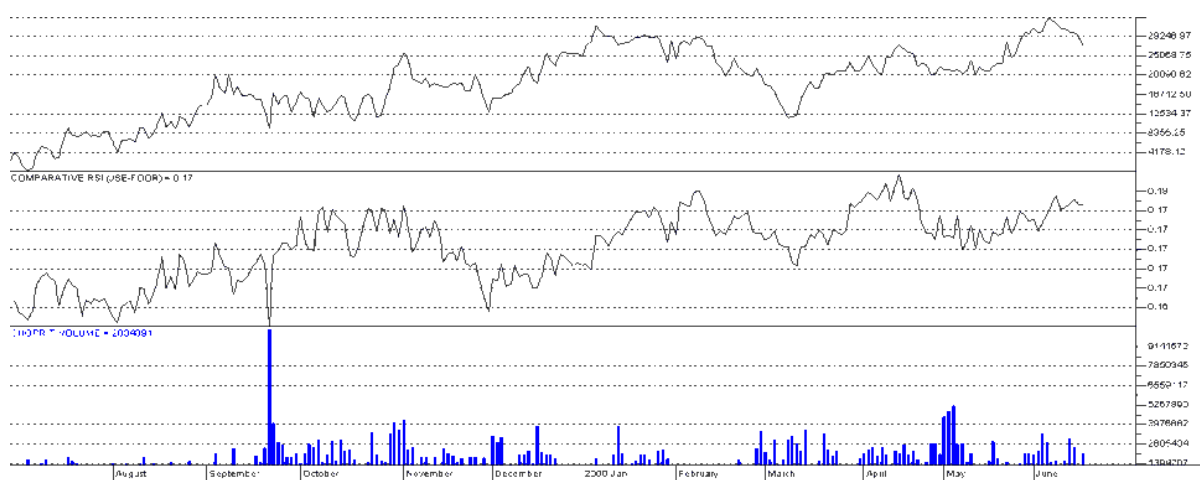
The stochastic compares where a share price is when compared with its trading range over two chosen periods called %K and %D. Like the MACD a buy signal is given when the %K plotting rises above the %D and sell signals when the, %D rises above the %K. Depending on where the plotting has reached on the scale, you can see whether a share is overbought or oversold. As a rule of thumb, I regard a share to be overbought when above 80 and oversold when below 20.



To get a better perception of the stochastic relationship with the share price, I have used a line plotting. As the %D plotting should be three-fifths of the %K, I have used 50 and 30 for the upper plotting and 25 and 15 for the lower plotting. The tighter fit of the lower plotting may have led you into traps in October and March but would have got you into the share earlier for the October rise, January fall and February rise. Having finished your technical scan, pick out those shares that have the most scans showing 'true'. Compare these with the results of the other indicators you have requested.

Comparative RSI

Take note of the sector within which the share is quoted and using its comparative RSI chart take note whether it is performing in line with the sector as a whole or not.



I have charted the price of Shoprite as a line plotting so that you can better compare its performance with the comparative RSI of the Food and Drug sector. The two lines are very similar, but on the far right, the share price fell by more than the comparative RSI. This warrants further fundamental investigation into why it has done so.

Also of interest in this chart is the volume plotting that often rises when the share reaches a low. The huge rise in volume took place in September when the share fell less severely than the sector but the fall was accompanied by huge volume. The price quickly regained its loss. A Moving Average is used to smooth out misleading information. In this chart of Absa you can see that initially, while the price is highly volatile, the 10-day Moving Average moves in line with the share's general direction in a much more orderly fashion. At the same times it leaves you in no double about the general direction of the share. As they are made up from the sum of the prices over the given period, moving averages lag the price. But by using an exponential moving average, where the greatest weight is given to the most recent information, the lagging period is reduced.

Before taking another step, using current company information, check the fundamentals of the share. Even if you are a trader, never, ever blindly go into a share before you know something about its fundamentals, and the market it serves. Longer-term investors will take particular note of its Dividend and Earnings record.

Current Company Information

By Ben Temkin

I find that, as well as an excellent charting program, this program provides me with all the vital fundamentals I need to reach an investment decision. The training video explained the bars at the top of the chart that tell you important information on vital fundamentals, Dividend Yield (DY), Earnings Yield (EY), Price Earnings ratio (PE), Market Capitalisation (Mrk Cap) and number Deals (Deals).

While extremely important it must be remembered that the first three items are calculated using the current price together with the historic information. This historic information is the latest reported earnings and dividend figures over a 12-month period preceding the latest interim or annual report.

A company's historic earnings per share are the Headline Earnings divided by the number of shares in issue. The EY is the historic Headline Earnings per share shown as a percentage of the current share price. If a company is doing better now than in that 12-month period then the EY will be less than its forward or future yield, but if doing worse, the EY will be lower than the forward yield.

A Dividend is the portion of Headline Earnings that is distributed to shareholders. The DY is the historic dividend shown as a percentage of the current share price. Assuming there is no change in the dividend distribution, this is the yield expected if the share is bought at the current price and future dividends are unchanged. But if the headline earnings change, the dividend yield may be increased or reduced in the future.

Yields move counter cyclically to share prices. As a share price improves, the earnings and dividend yields fall and as the share price falls, they improve. Therefore investors seeking income from their investment should not be seduced into buying a share purely on its high yield. The share price may have dropped because negative news about the company may have dipped the share price because its outlook is less encouraging than before. If earnings are expected to be reduced, so most likely will the forthcoming dividend.

The price-earnings ratio (PE) is a favourite amongst investors as it illustrates how the investment community regards the share. A high PE might mean that the share has been pushed up by the expectation of increased profitability, while a low PE can indicate that the share is good value at its current price but may be unpopular. As the PE calculation includes the historic earnings figure, it may be higher or lower than future or forward expectations. Typically high PEs are found in the sectors that are booming and so rather than comparing a share's PE ratio with those for the whole market, compare it with the ratios of its own sector.

It is useful to remember that the earnings yield is the reciprocal of the PE x 100 as a percentage. Thus a PE of 5 tells you the earnings yield is $1/5 \times 100$, which is 20%.

Conversely, the PE is the reciprocal of the earnings yield x100 as a ratio. For example, if the earnings yield is 13%, the PE will be $1/13 \times 100$ which is 7,69. Not included in the DY calculation may be a possible scrip dividend. Rather than paying a cash dividend some companies distribute additional shares to current shareholders. On other occasions the company may pay part of the dividend in cash, and the balance in more shares. As the JSE does not recognize a scrip dividend it is therefore excluded in the DY calculation.

Mkt Cap is up to date and is calculated using today's price multiplied by the number of shares in issue.

The number of deals is an important piece of information. Compare it with the volume as a huge transaction, like shares passing between two unit trusts would count as one deal, while lots of private investor transactions are individually noted.

The private investor deals better reflect the market mood.

The Company Information option provides you with almost as much information as visiting the company web site.

Stock Exchange News Service (SENS) is also an important source of information as it not only gives you the latest news, but all the items of official news about a share that has taken place over a period. This ability to look back is important especially when a company is in negotiations. By looking back you can see details of proposals and the progress of the negotiation. If a share price suddenly shoots up, or down SENS may tell you the reason why.

For traders the most important piece of information given in current Closing Statistics is the latest bid and offer prices. A buyer would check the last Offer price and a buyer the latest Bid price. The Highs and Lows records are interesting, but the bottom figure, the Number of Shares in Issue makes you realise that you are a small fish in a vast pond.

Comments tell you the background of a share as well as the brands it sells and the names of the board of directors as well as major shareholders. The bottom section of each Comment that gives you the actual Dividend, Earnings, Net Asset value history of the share is vital information for the long-term investor. The Earning figure, for example, may have slipped in one year as a result of the economic situation, but a general build up in earnings illustrates the quality of the share.

As long as its overall earnings track record has been positive, it can be judged as sound in the long term.

The Net Asset Value (NAV) tells you what the share would have been worth if the company has been wound up on the day of the last report.

Dividends are paid out of earnings, but with a few exceptions, a percentage of a company's earnings are retained to fund expansion. Retaining earning for expansion

makes better sense than borrowing at high rates of interests. As many investors buy or sell according to the amount of the dividend, some companies attempt to maintain a steady rise in dividend income even if profits are not rising. Typically retained earnings are used for this purpose.

Major Shareholder information is interesting particularly in the case of heavy-weight companies. The quality of a share might be judged by its major shareholders. If the big boys are happy to hold large quantities of the shares, so should you.

Statutory Information provides contact details and lists its directors.

In Financials Ratios as well as Debt/Equity and Debt/Assets and Return on Assets and Equity an important item for longer term investors is Dividend Cover. Dividend Cover is how many times the earnings are divided by the dividend. If the dividend cover is low, it may mean that the company is not investing in itself for the future expansion. A low dividend cover may also mean that in bad times, a dividend may be cut, or passed.

Financials are mini version of Balance Sheets going back five years. The differences between earnings which include non-recurring items and headline earnings are made apparent. The Headline Earnings figure gives a more accurate picture of the company's progress than overall earnings. A non-recurring earnings item, say the sale of a subsidiary, may result in a special dividend being declared. The share price typically drops by around the amount of that dividend after it has been distributed.

Directors' Dealings give you an insight into how those who run the company feel about it. Directors buying shares is bullish, and directors' selling shares is bearish.

Naming Conventions Used in All Databases

All South African Unit Trusts start with **“U-“**
 All Namibian Unit Trusts start with **“N-“**
 All Financial Futures start with **“F-“**
 All Agricultural Futures start with **“A-“**
 All JSE Indices start with **“JSE-“**

Indices

All International Indices start with “I-“ :

Dow Jones Industrial I-DJ-INDU
 Dow Jones Average Index I-DJ-COMP
 Dow Jones Transportation I-DJ-TRAN
 Dow Jones Utilities I-DJ-UTIL
 Nasdaq Composite I-NASDAQ
 Amex Composite I-AMEX
 Standard & Poor 500 I-SP500
 New York Stock Exchange I-NYSE
 Philadelphia Gold I-PHLXGLD
 American Gold Bugs Index I-GLDBUGS
 Comex Gold 100oz GC Comex I-COMEX
 Russel 2000 Index I-RUSSEL2K
 Toronto Stock Exchange I-TORONTO
 S&PTSX Canadian Gold Index I-TSXGOLD
 US 10-Note Interest Rate I-TNOTE10
 US 30 Year Treasury Bond I-TBOND30
 Morgan Stanley High Tech Index I-MSHITECH
 American SA Investment Trust I-ASA
 Commodities Research Bureau Futures index I-CRBFUTR
 Commodities Research Bureau Spot Index I-CRBSPT
 Amsterdam AEX Index I-AEX-IDX
 Germany Dax Index I-DAX-IDX
 Paris CAC Index I-CAC-40
 Swiss SMS Index I-SWISS
 Financial Times 100 Index I-FT-100
 Financial Times 250 Index I-FT-250

Financial Times Gold Index I-FT-GOLD
 Tokyo Nikkei 225 Index I-NIKKEI
 Hong Kong Hang Seng Index I-HANGSNG
 Sidney All Share Index I-AUSTRAL
 Baltic Dry Index I-BALTIC
 MSCI Emerging Markets Index I-MSCI
 Bombay BSE Sensex Index I-SENSEX
 Shanghai SSE 180 Index I-SSE180

Commodities

All commodities start with “M-“ :

Copper M-COPPER
 Tin M-TIN
 Lead M-LEAD
 Zinc M-ZINC
 Aluminum M-ALUMINM
 Nickel M-NICKEL
 Brent Oil Index M-BRENT
 Palladium M-PALLADM
 Gold Closing Price in Euro M-GOLDEUR
 Gold Pm in US\$ M-GOLD-\$
 Gold PM in South African Rand M-GOLDZAR
 Platinum Closing Price M-PLATINM
 Platinum Closing Price in Rand M-PLATZAR
 Silver Closing Price in US\$ M-SILVER\$
 Silver Closing Price in Rand M-SILVZAR
 Gold Closing Price In Japanese Yen M-GOLDYEN
 Gold Closing Price in British Pounds M-GOLDGBP
 Gold Closing Price in Swiss Francs M-GOLDSFR

Currencies

All currencies start with “C-“ :

US Dollar in Euro C-\$-EURO
 US Dollar in Japanese Yen C-\$-JYEN
 US Dollar in Swiss Franc C-\$-SWFR
 US Dollar in British Pound C-\$-GBP
 US Dollar in Australian Dollar C-\$-AUS\$
 US Dollar in South African Rand C-\$ZAR-AM
 US Dollar in Euro C-EUR-YEN
 Euro in British Pounds C-EUR-GBP
 Euro in US Dollar C-EUR-\$
 British Pound in US Dollar C-GBP-\$
 British Pound in Japanese Yen C-GBP-YEN
 Euro in Swiss Franc C-EUR-CHF

Euro in South African Rand C-EUR-ZAR
 US Dollar in Brazilian Real C-\$-BRL
 US Dollar in Canadian Dollar C-\$-CAD
 US Dollar in Mexican Peso C-\$-MEXP
 US Dollar in South Korean Won C-\$-KRW
 US Dollar in Taiwanese Dollar C-\$-TWD
 US Dollar in South African Rand PM C-\$ZAR-PM
 US Dollar in Botswana Pula C-\$-PULA
 British Pound in South African Rand C-GBP-ZAR

South African Rand in Swiss Franc C-R-SWFR
South African Rand in Japanese Yen C-R-JYEN

Bonds

All Bond Index ALBI
RSA Bonds Index GOVI
OTHI Bonds Index OTHI
RSA 13.5% 2014/15/16 R157
RSA 10.5% 21-06-2026 R186
RSA 8,75% 2014 R201
RSA 203 Bond R203
RSA 8% DEC. 2018 R204

Advance Decline Indicators

A/D HI-LO All Shares HILO-OVER
A/D HI-LO Industrials HILO-INDU
A/D HI-LO Financials HILO-FINA
A/D HI-LO Basic Materials HILO-BMAT
A/D HI-LO Consumer Goods HILO-CONG
A/D HI-LO Consumer Services HILO-CONS
A/D HI-LO Health Care HILO-HCAR
A/D HI-LO Oil & Gas HILO-OGAS
A/D HI-LO Technology HILO-TECH
A/D HI-LO Telecommunication HILO-TELE
A/D NET All Shares NET-OVER
A/D NET Industrials NET-INDU
A/D NET Financials NET-FINA
A/D NET Basic Materials NET-BMAT
A/D NET Consumer Goods NET-CONG
A/D NET Consumer Services NET-CONS
A/D NET Health Care NET-HCAR
A/D NET Oil & Gas NET-OGAS
A/D NET Technology NET-TECH
A/D NET Telecommunication NET-TELE

Money Market

3 Month Banker's Acceptance Rate BA
Repo Rate REPO

Useful Hot-Keys

Portfolio Manager Alt+P
Add/Remove Volume Alt+V
Add/Remove Dividend Yield Alt+D
Add/Remove Earnings Yield Alt+E
Add/Remove PE Ratio Alt+R
Add/Remove number of deals Alt+N
Comments from the last 3 days Alt+C
Company Website Alt+W
Opens Layouts Alt+O
Company Information Alt+I
Stock Exchange News Service Alt+S
Moving Average Window Alt+M
Close Application Alt+F4
Print Graph Ctrl+P
Candle Graph Ctrl+C
Bar Graph Ctrl+B
Line Graph Ctrl+L
Help F1
Comparative RSI F2
Bollinger Bands F3
MACD F4
Simple Moving Average F5
RSI F6
On Balance Volume F7
Stochastic Oscillator F8
OB/OS F9
Momentum Oscillator F10
Data Window Space or numeric pad "+"
Next Share - Page Up
Previous Share - Page Down

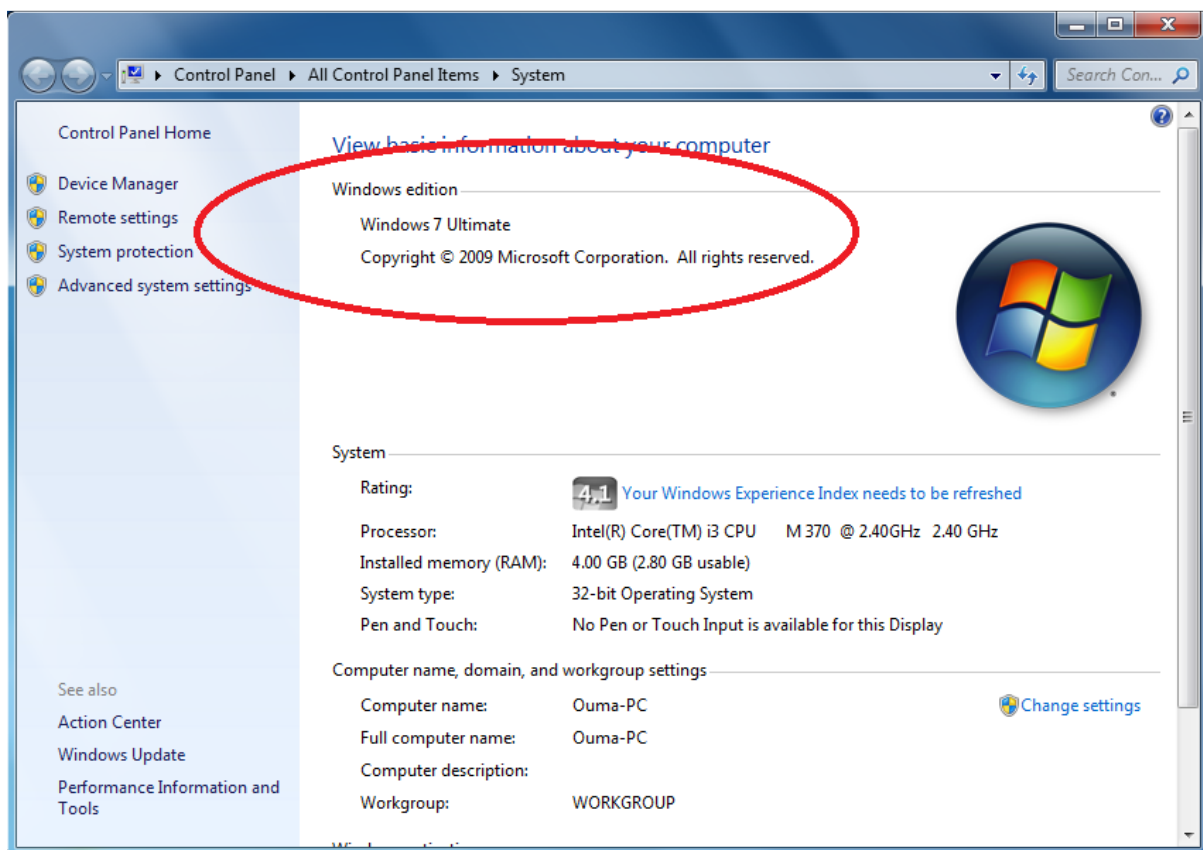
Installation Instructions

Before you put the disk in the computer, you first need to know what windows operating system your computer is using.

Please do the following:

- Right click on My Computer/Computer icon
- Then click on properties

Then you will have a window similar to this on the screen:



Yours will not be the same but it will give you details that you need to know. Now you can see what windows your computer is using and if there is any service packs installed.

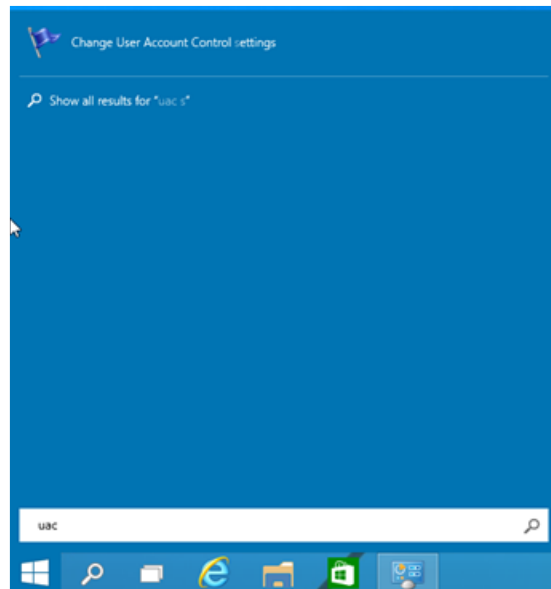
NB!!! Please disable the antivirus

If your computer is running on Windows XP, then skip this next step.

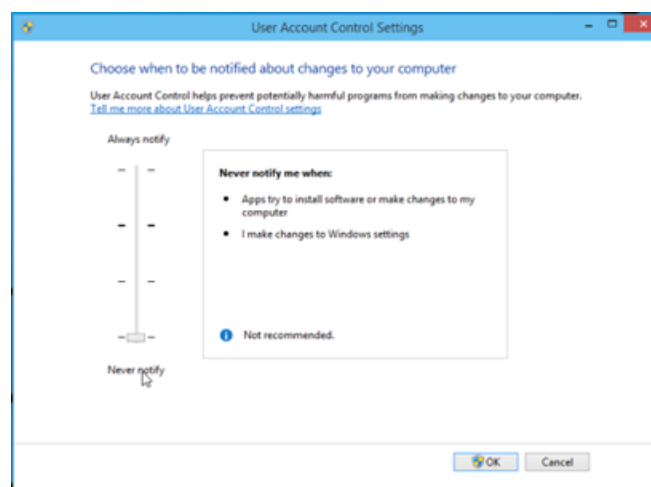
If your computer is running on Windows 7, Windows 8, Windows 10 or Windows Vista the first thing you'll have to do is **turn off the "user account manager" (uac)**.

Windows 10

You can click the Start button to open the Start menu and type the following in the Search box: UAC



Then click 'Change User Account Control settings' in the search results:



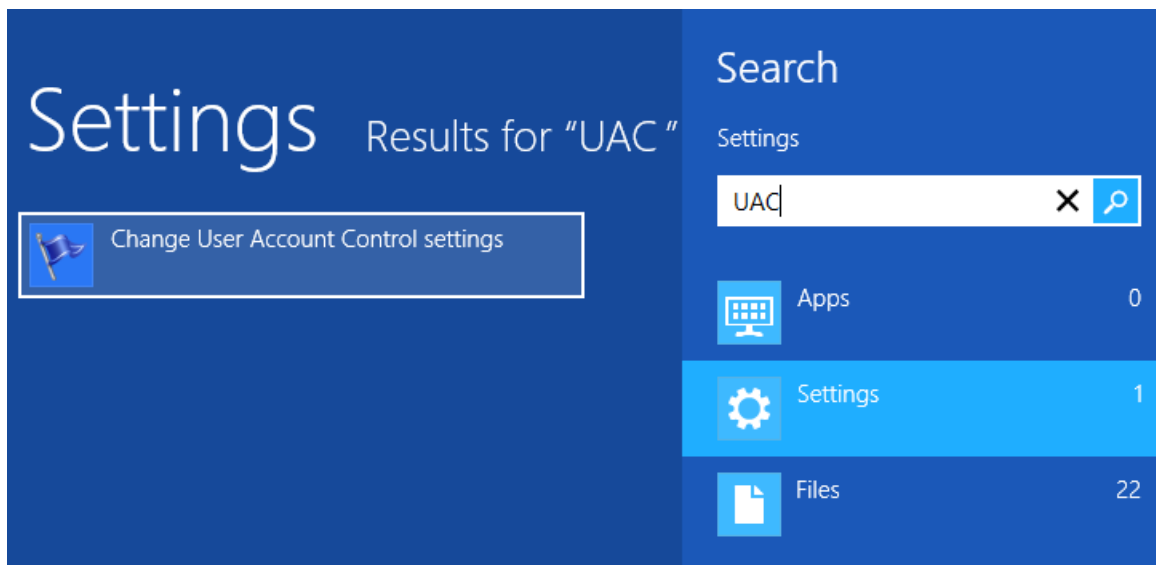
In the User Account Control settings dialog, move the slider to the bottom (Never Notify):

Then click OK. This will disable UAC.

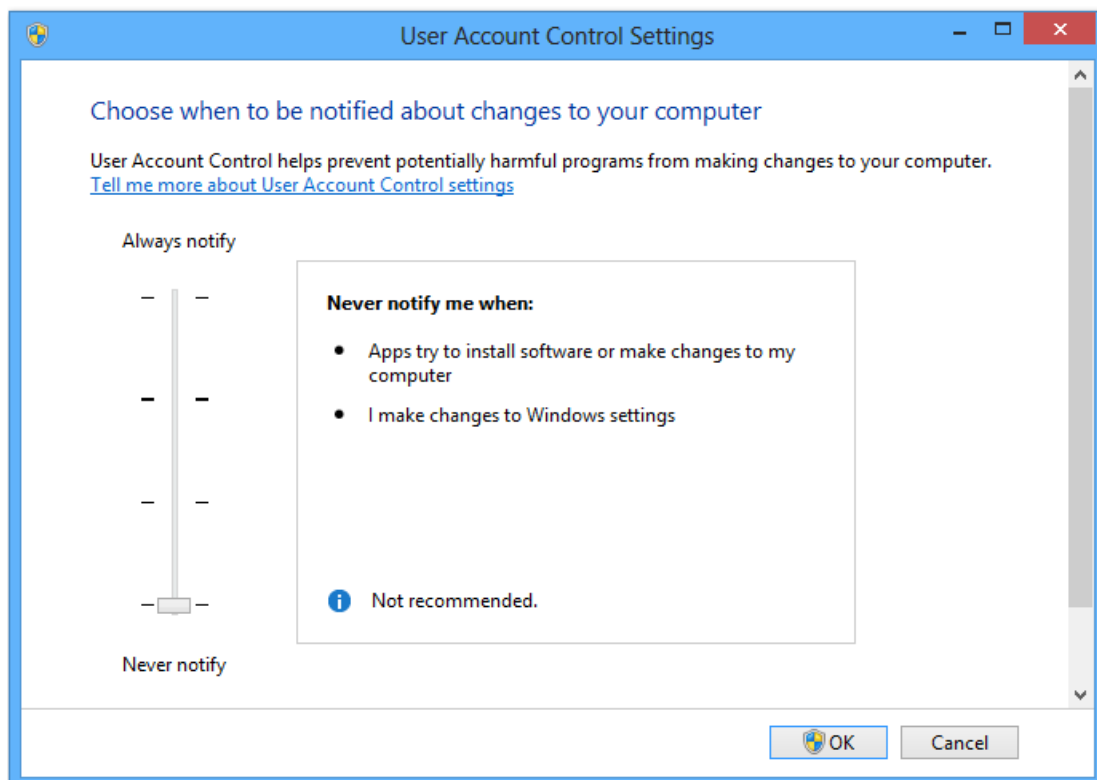
Windows 8

Open the search panel using the combination of keys (Win+Q).

Enter the UAC abbreviation, select the Settings element and choose Change user accounts control settings in the searching results.



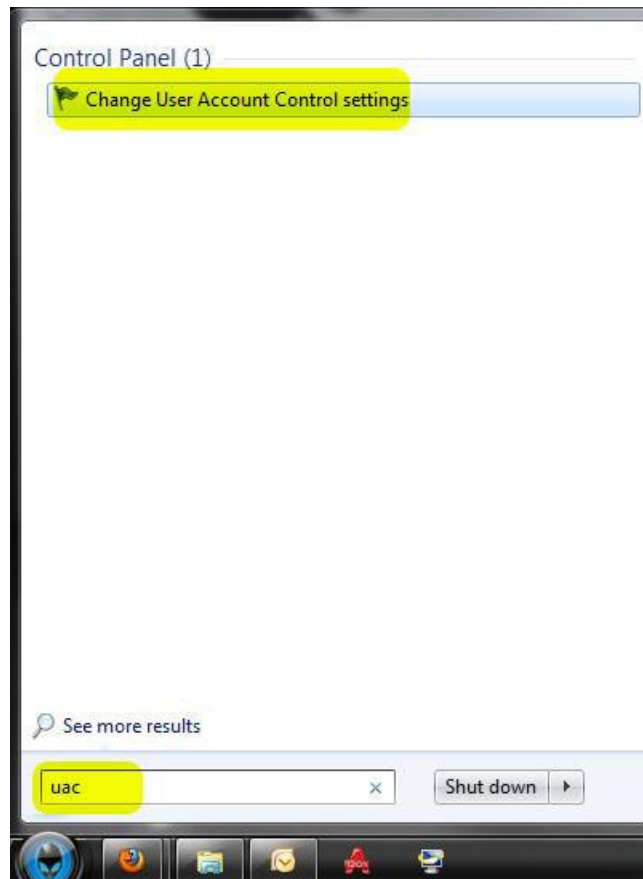
The menu Control of users accounts settings will open.



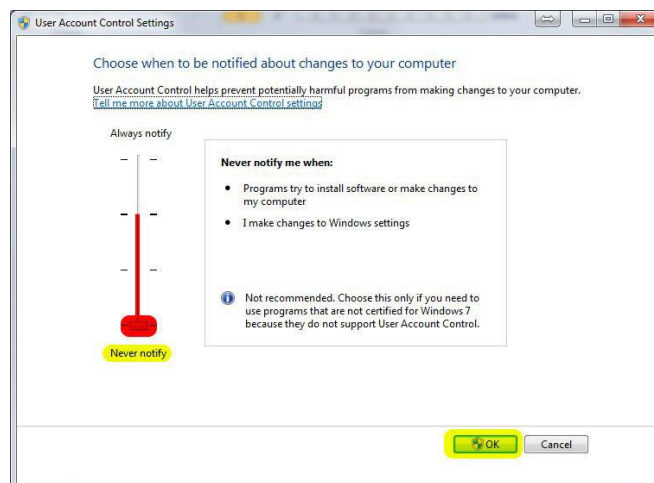
All done! When this is done then restart your computer.

Windows 7

Click the **Start Menu**. In the search by Type in **UAC**, then above you'll want to Click **Change User Account Control**.



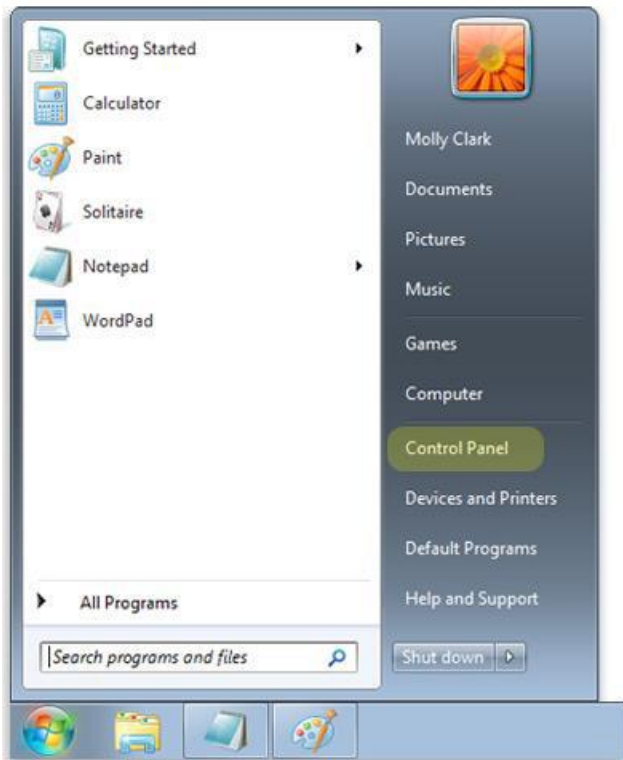
The User Account Control Settings window should appear. On the left, Click & Drag the **Notification Slider** down so that it says **Never Notify**. Click **OK** to save.



All done! When this is done then restart your computer.

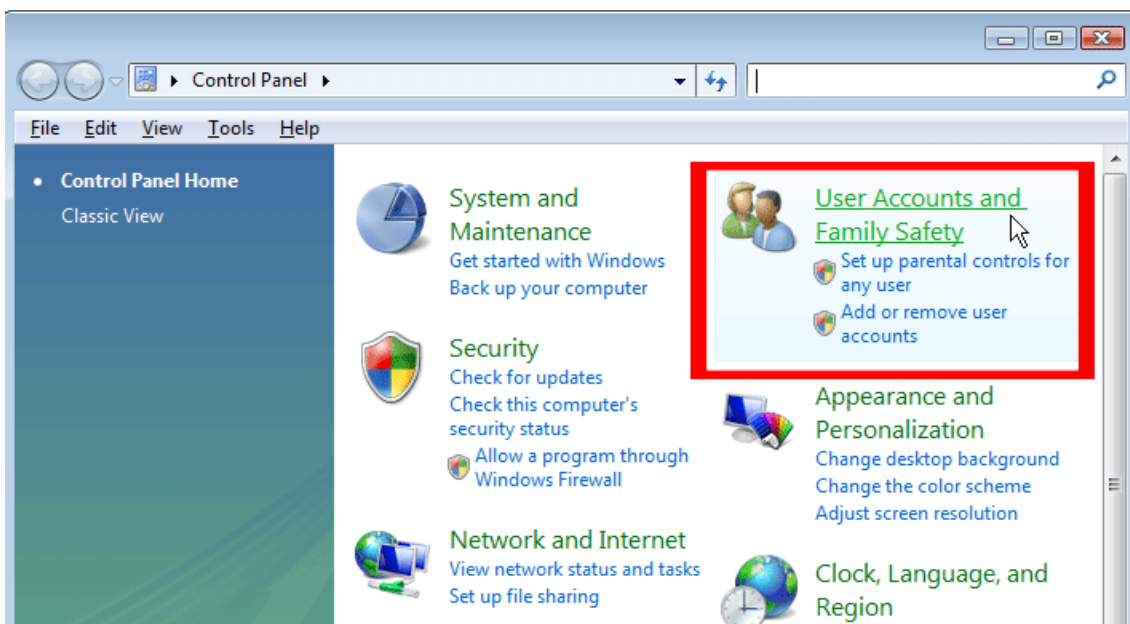
Windows Vista

Click on the Start button in the bottom left corner of your screen.



Click on control panel.

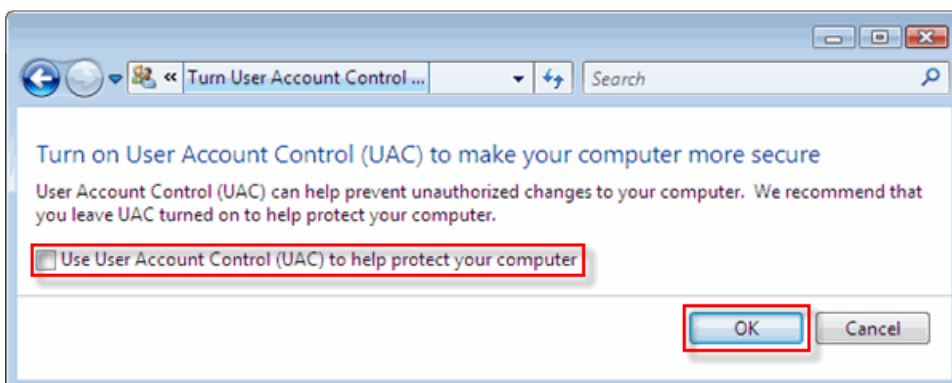
Once opened locate the “User Accounts and Family Safety” option and click on green writing.



Once opened locate the “turn user account control on or off” and click on it.



On the next screen you should uncheck the box for “Use User Account Control (UAC)”, and then click on the OK button.



All done! When this is done, then restart your computer.

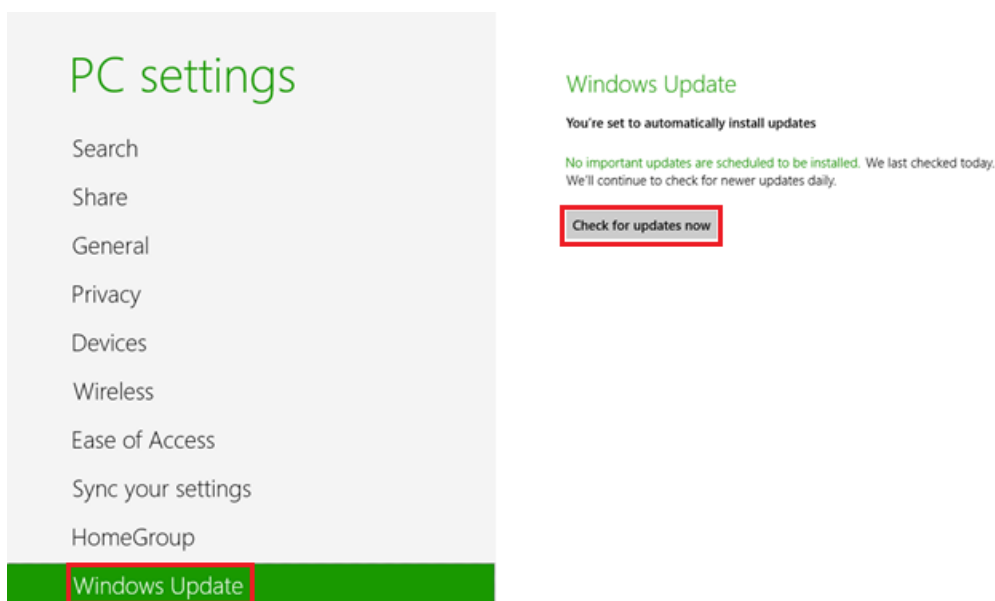
Now in order for the program to install and work at its best you will need to update your windows.

Updates on Windows 8

Open the search panel, using the combination of keys (Win+Q) and type "Windows Update" in Search bar and click it.



Now all you will need to do is click on **Check for updates now**.



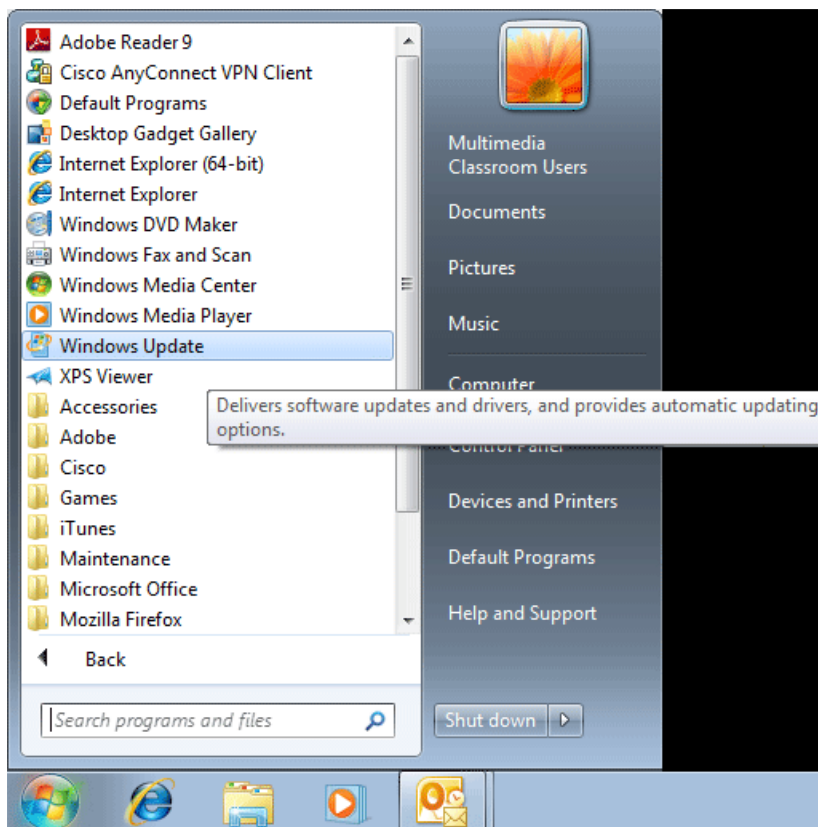
Please restart the computer after update is installed

NB!!!!!! Do the process again and again till it says your windows is up to date.

Updates on Windows 7

Click on **Start** in the lower left hand corner.

From here, click on **All Programs**, then **Windows Update** (this should be near the top of the list).



Install any updates that may be found for your computer.



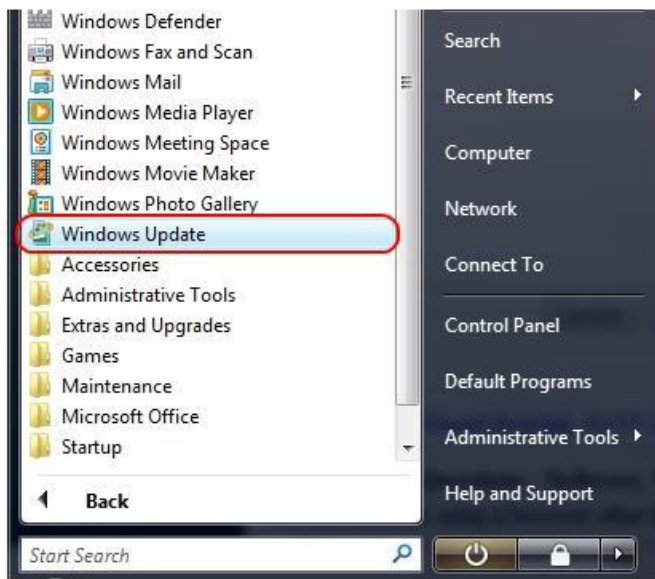
Please restart the computer after update is installed

NB!!!!!! Do the process again and again till it says your windows is up to date.

Updates on Windows Vista

Click on **Start** in the lower left hand corner.

Then on **All Programs** and then search for **Windows Update**.



If updates are available, click the **Install updates** button to begin downloading and installing the updates.



Please restart the computer after update is installed.

NB!!!!!! Do the process again and again till it says your windows is up to date.

Insert Disk 1

Once the disk has been put in a window like this will appear.

DVD RW Drive (D:) SFP2008

Choose what to do with this disc.

Install or run program from your media



Run Autorun.exe
Publisher not specified

Other choices



Open folder to view files
File Explorer



Take no action

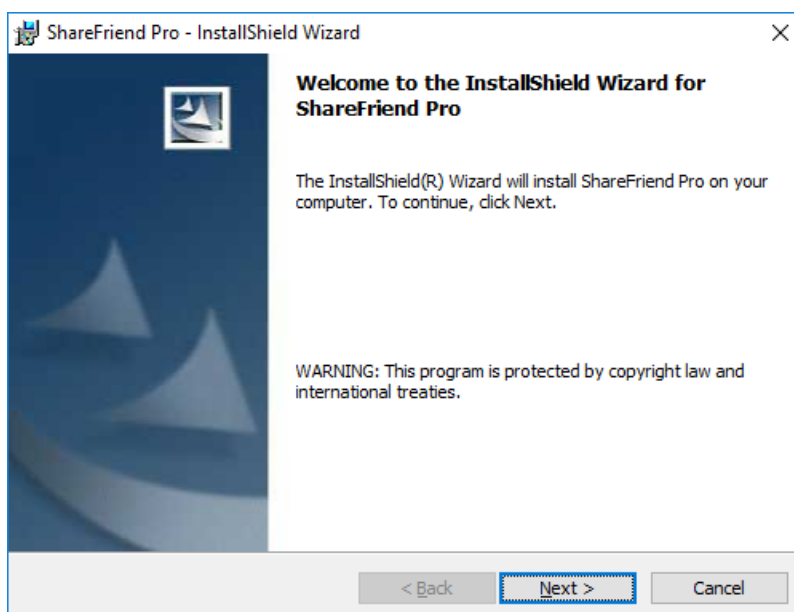
Click on "Run Autorun.exe"

There is now a window like this:

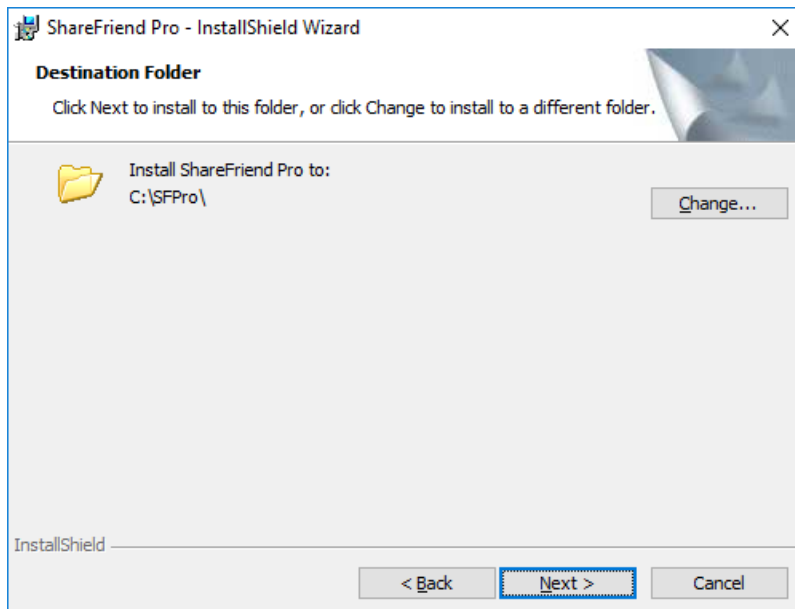


Click on “Share Friend Pro”

First a window like this will appear:

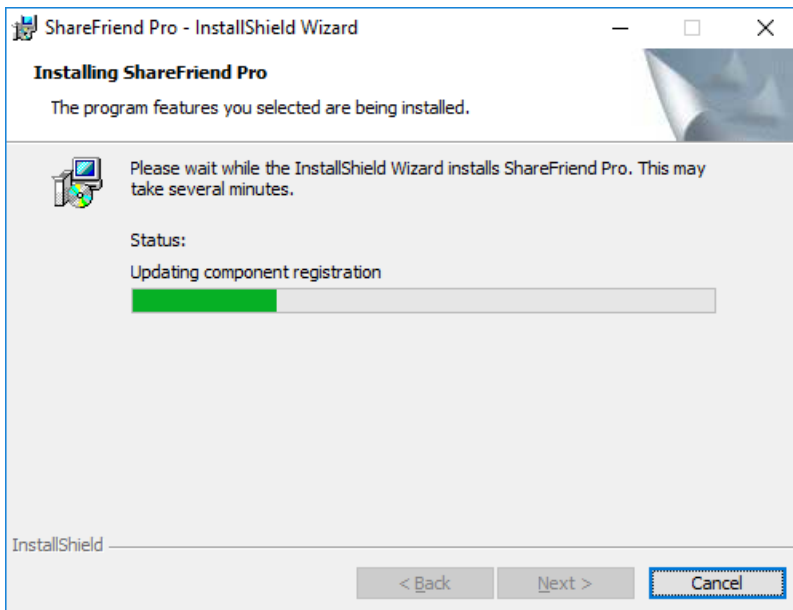


Click “next” and then this widow will appear:

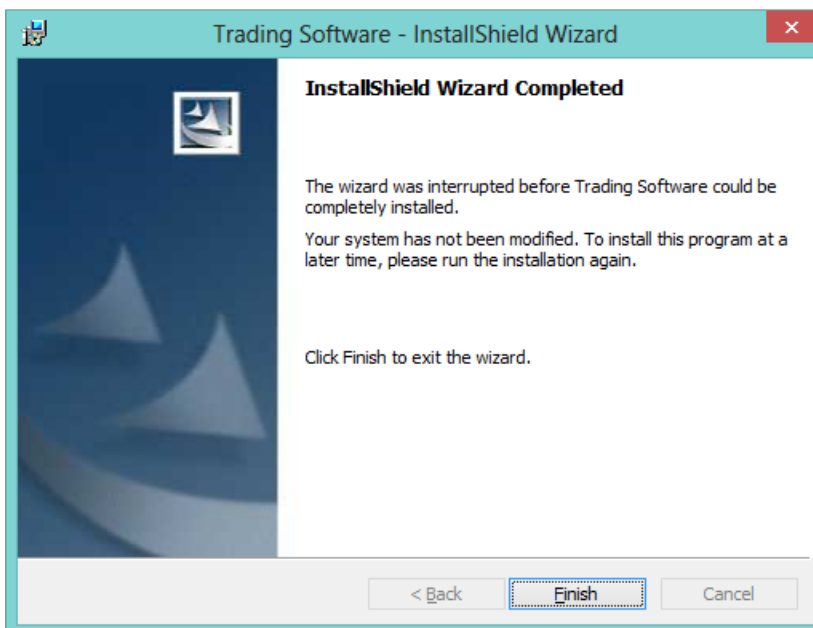


Click on next for the installation to start.

Now a window like this will appear for a while please let it complete:



Now click on finish.

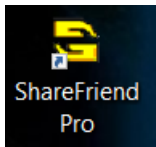


Now you will see a new icon on the desktop with the charting logo.

Double click on this icon:



Or



Then you will get a window like this:



Type in Serial Number SFP2008 with no spaces.

Now click on next.

This will appear and it means the program is starting:



NOTES: