

iOCBC ChartSense

User Guide

Introduction

With thousands of financial instruments to choose from, how do you find trade opportunities that make sense to you? While stock values fluctuate, how do you know when a price move matters? ChartSense, powered by Recognia's proprietary algorithm will provide you with unique investment analysis that will help in your investments and trading decisions.

ChartSense provides trading support tools to seasoned as well as novice investors and traders. ChartSense components provide a powerful blend of power and usability, allowing you to quickly find trade ideas, to validate recent trade opportunities, and enable automatic stock monitoring.

What this guide covers?

This guide will teach you the basic skills required to get started with ChartSense.

You will learn to:

- Generate Trading Ideas
- Validate recent picks and choose entry/exit points
- Monitor Stocks you are interested in

Finding Trade Ideas

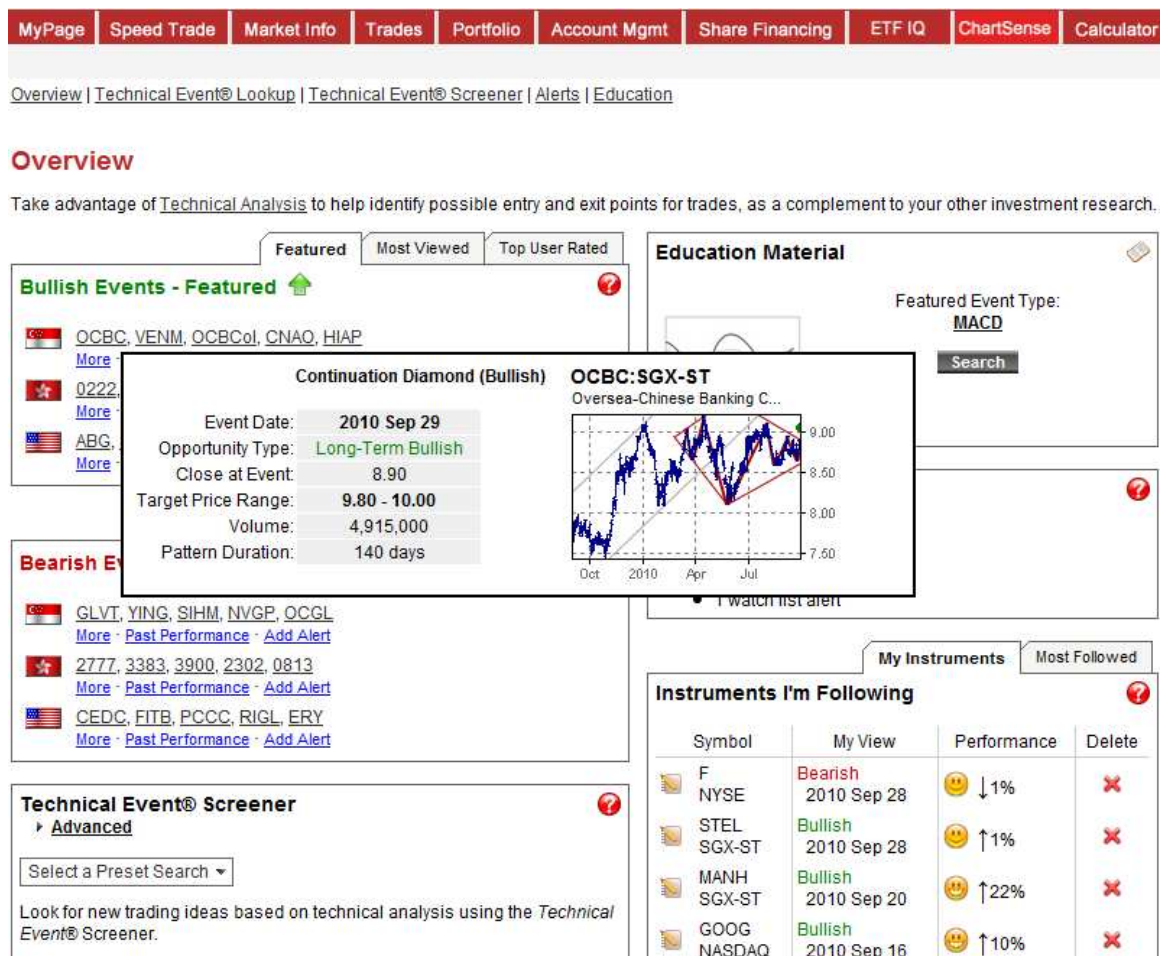
Discovering trade ideas with ChartSense is fast, easy, and requires only a few simple steps. You'll be on your way to uncovering a universe of trade ideas based on your own investment or trading preferences in minutes.

On the ChartSense **OVERVIEW** screen, you will find **FEATURED TECHNICAL EVENTS** listed in the **BULLISH** and **BEARISH** areas which will provide a convenient way for you to explore current trade ideas at a glance.

To view detailed information on Featured Technical Events

1 From the **OVERVIEW** page, hover the cursor over any displayed stock symbol. (See Figure 1)

A pop-up window appears listing important information about that stock, including the type of technical event that has occurred, the date it occurred, and more.



The screenshot shows the OCBC ChartSense Overview page. At the top, there is a navigation bar with links: MyPage, Speed Trade, Market Info, Trades, Portfolio, Account Mgmt, Share Financing, ETF IQ, ChartSense, and Calculator. Below the navigation bar, there are links for Overview, Technical Event® Lookup, Technical Event® Screener, Alerts, and Education.

The main content area is divided into several sections:

- Featured**: A tab for the current view, with other tabs for Most Viewed and Top User Rated.
- Bullish Events - Featured**: A list of bullish events with a "More" link for each. One event is highlighted in a popup window.
- Bearish Events**: A list of bearish events with "More" and "Add Alert" links.
- Technical Event® Screener**: A section for finding new trading ideas based on technical analysis.
- Education Material**: A section for learning more about technical analysis.
- Instruments I'm Following**: A table showing the performance of instruments the user is following.

The popup window for **OCBC:SGX-ST** (Oversea-Chinese Banking C...) displays the following information:

- Event Date: 2010 Sep 29
- Opportunity Type: Long-Term Bullish
- Close at Event: 8.90
- Target Price Range: 9.80 - 10.00
- Volume: 4,915,000
- Pattern Duration: 140 days

The popup also includes a line chart showing the stock price from October 2010 to July 2011, with a red line indicating the technical event pattern.

The **Instruments I'm Following** table is as follows:

Symbol	My View	Performance	Delete
F NYSE	Bearish	☹️ ↓1%	✖️
STEL SGX-ST	Bullish	☺️ ↑1%	✖️
MANH SGX-ST	Bullish	☺️ ↑22%	✖️
GOOG NASDAQ	Bullish	☺️ ↑10%	✖️

Fig 1: Popup Information on Featured Technical Events

These panels highlight stocks that are poised to move based on recently formed chart patterns and other pre-selected criteria. And, if you are interested in what others are doing, the secondary tabs allow you to view what other traders are looking at by loading the “Most Viewed” and “Top User Rated” Technical Events.

VALIDATING STOCKS OF INTEREST AND CHOOSING ENTRY/EXIT POINTS

Before you make a trade, use ChartSense for an impartial perspective on where the price of your instrument may be headed.

Simply enter the ticker symbol into the “Technical Event Lookup” box on the main page, and you'll see a list of Technical Events that have recently been identified for that stock.

Technical Event Lookup

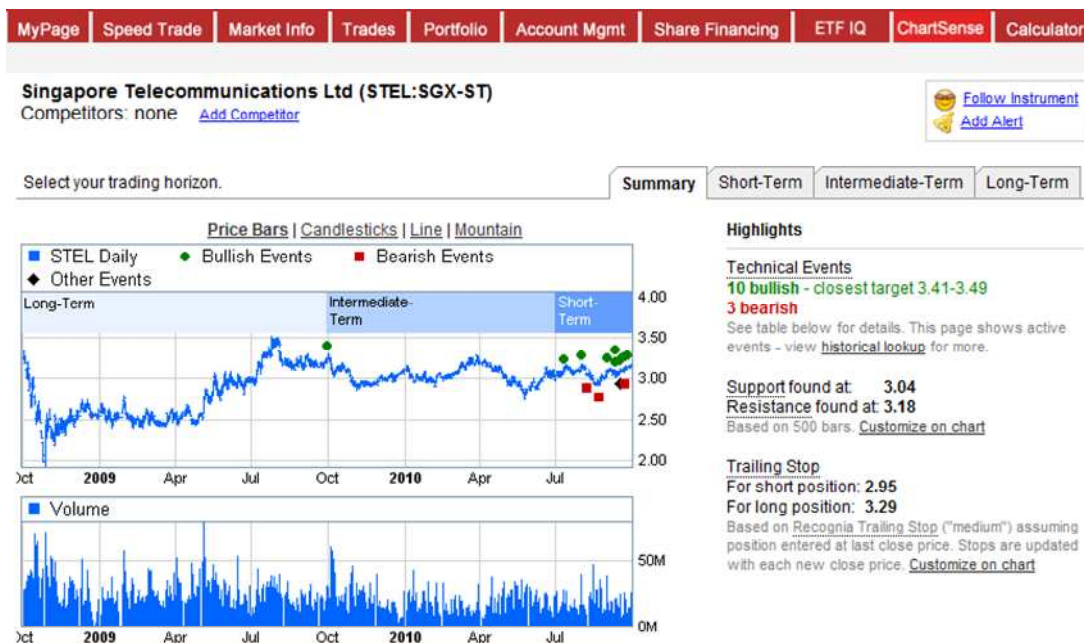
Using Technical Event Lookup will allow you to quickly understand the outlook for a particular financial instrument from the perspective of technical analysis.



Enter a ticker symbol and select the appropriate tab for your needs. The tabs provide three different outlooks depending on your trading horizon:

- Summary of all three outlooks
- Short-Term (outlook for the next 2 to 6 weeks)
- Intermediate-Term (outlook for the next 6 to 39 weeks)
- Long-Term (outlook for the next 9 months to 2 years+)

The main price chart summarizes the Technical Event opportunities that have occurred for the specified instrument. A Technical Event is a significant price situation based on the principles of technical analysis. These events provide an indication of a bullish or bearish price situation. The dates of the bullish and bearish events are marked on the price chart using green and red markers. There are many types of Technical Event opportunities - each with their own implication - therefore it is possible to see both bullish and bearish events occurring at the same time. Generally the predominant color gives you an indication of whether the outlook for the instrument is predominantly bullish or bearish.



Technical Event opportunities are listed below the main price chart so that you can review them for more detailed information. Certain types of events offer specific target prices to give you a sense of how far the price might move. Only the currently active Technical Event opportunities are displayed by default in order to provide a current outlook for the instrument. To view a fuller history of events, expand the "Options" bar below the chart by clicking on it, then change the "Show Me" selection from "Active Events" to "All Events".

Remember, these are the active Technical Events for the stock - those that are still in play - but you can recall past events by clicking "Historical Technical Event Lookup".

In the "Highlights" area to the right, you will find the "Support & Resistance" lines and the recommended "Trailing Stop" points for both long & short positions. These can both be used to pick entry and exit points.

Setting Alerts

Save your Technical Event Screener criteria as an alert and Recognia will send matching trade opportunities directly to your Inbox overnight. Once set, these alerts are grouped under the “New Opportunities” tab.

Alerts are system-generated emails that notify you when events of significance occur. These may be new opportunities found by scanning the Technical Event results across a market, new Technical Event trading opportunities for one or more securities, or a price crossing a significant threshold, such as a support/resistance line or a trailing stop level.

Step 3: Alert Details

Securities from the SGX-ST exchange

Price and Volume			
Price on Event Date:	Min: <input type="text"/>	Max: <input type="text"/>	
Volume on Event Date:	Min: <input type="text"/> ▼	Max: <input type="text"/> ▼	
Market Capitalization:	Min: <input type="text"/> ▼	Max: <input type="text"/> ▼	
Event Type <i>(Find companies with these types of events)</i>			
Event Class:	<input checked="" type="radio"/> Classic Patterns	<input type="radio"/> Indicators	
	<input type="radio"/> Short-term Patterns	<input type="radio"/> Oscillators	
Opportunity Type:	<input type="radio"/> Bullish (price moving upward)	<input type="radio"/> Other (short-term patterns only)	
	<input type="radio"/> Bearish (price moving downward)	<input checked="" type="radio"/> Any (bullish, bearish or other)	
Event Type:	<input type="text" value="Any Classic Pattern type"/> ▼		
Event Specific Information			
Price Period:	<input type="radio"/> Daily	<input type="radio"/> Weekly	<input checked="" type="radio"/> Any
Event Duration:	Min: <input type="text"/>	Max: <input type="text"/>	(days)
Inbound Trend Duration:	Min: <input type="text"/>	Max: <input type="text"/>	(days)
Possible Percentage Price Move:	Min: <input type="text"/>	Max: <input type="text"/>	(percent)

MONITORING STOCKS

ChartSense powered by Recognia has automated the monitoring and surveillance for you and conveniently notifies you when events of significance happen to your instruments.

Setting Alerts for Notifications

Alerts are system-generated emails that notify you when events of significance occur to your stocks.

You can set up your alerts in two ways;

1. From the Alerts tab in the product, you can add any new alert by clicking the “Add Alert” button and follow these three easy steps;

Alerts

Use this wizard to create alerts. The system will automatically notify you when events of significance occur.

[View My Alerts](#)

[Delivery Options](#)

Step 1: Select an Alert Type

Provide a name for your alert for future reference, and select the type of alert you want to set up.

Alert Name	
Name:	<input type="text" value="New Alert"/>
Alert Type	
New Opportunities:	
<input checked="" type="radio"/> Alert me about new opportunities.	
Watch List:	
<input type="radio"/> Alert me about Technical Event® opportunities for symbols of interest.	
Specific Security:	
<input type="radio"/> Alert me about Technical Event® opportunities for an instrument.	
<input type="radio"/> Alert me when the instrument's price crosses a threshold.	
<input type="radio"/> Alert me when the instrument's price crosses a support/resistance line.	
Stops:	
<input type="radio"/> Alert me when the instrument's price crosses a stop-loss level.	

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Step 2: Instrument Universe Selection

Provide details about the market and industry in which you want new opportunities.

Universe Details	
Instrument Type:	Security <input type="button" value="v"/> <input type="checkbox"/> ETFs Only
Exchange:	Singapore Exchange <input type="button" value="v"/>
Industry:	Any <input type="button" value="v"/>

[<< Previous](#)

[Next >>](#)

Step 3: Alert Details

Securities from the SGX-ST exchange

Price and Volume			
Price on Event Date:	Min:	<input type="text"/>	Max: <input type="text"/>
Volume on Event Date:	Min:	<input type="text"/>	Max: <input type="text"/>
Market Capitalization:	Min:	<input type="text"/>	Max: <input type="text"/>
Event Type (Find companies with these types of events)			
Event Class:	<input checked="" type="radio"/> Classic Patterns	<input type="radio"/> Indicators	
	<input type="radio"/> Short-term Patterns	<input type="radio"/> Oscillators	
Opportunity Type:	<input type="radio"/> Bullish (price moving upward)	<input type="radio"/> Other (short-term patterns only)	
	<input type="radio"/> Bearish (price moving downward)	<input checked="" type="radio"/> Any (bullish, bearish or other)	
Event Type:	<input type="text" value="Any Classic Pattern type"/>		
Event Specific Information			
Price Period:	<input type="radio"/> Daily	<input type="radio"/> Weekly	<input checked="" type="radio"/> Any
Event Duration:	Min:	<input type="text"/>	Max: <input type="text"/> (days)
Inbound Trend Duration:	Min:	<input type="text"/>	Max: <input type="text"/> (days)
Possible Percentage Price Move:	Min:	<input type="text"/>	Max: <input type="text"/> (percent)

- The second way to have automatic monitoring set up is simply enter the ticker symbol into the “Technical Event Lookup” Field and you will see the option on the right to “Add alerts” and “Follow Instruments”.

Keep a list of stocks you're following. Indicate which direction you think it's headed in (bullish or bearish) as of today or another specified date, and we'll keep you posted on whether it's on track!

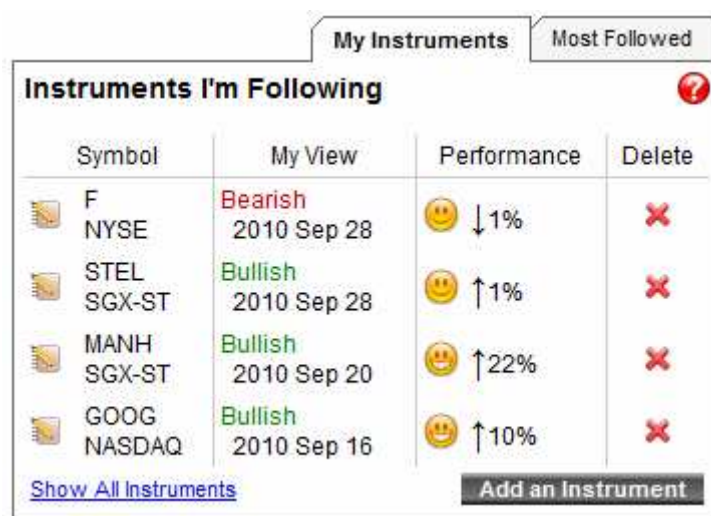
Type:	<input type="text" value="Security"/>
Symbol:	<input type="text"/> Singapore
My View:	<input type="text" value="Bullish"/> on <input type="text" value="2010"/> <input type="text" value="09"/> <input type="text" value="30"/> (YYYY-MM-DD)
Note:	<input type="text"/>
<input type="button" value="Submit"/>	













You may also use alerts to identify a price crossing a significant threshold, such as a [support/resistance](#) line or a trailing [stop](#) level. This gives you the ability to stop at your chosen comfort level or strategy.

Use Followed Instruments

On the main page, you'll find a panel called "Instruments I'm Following". There's no easier way to keep tabs on the stocks you're following. Simply add a ticker symbol, and indicate whether you call it bullish or bearish. We'll follow it and show you whether the price has gone up or down since your call.

This is an easy way to simply track the progress of stocks you're interested in.



Symbol		My View	Performance	Delete
	F NYSE	Bearish 2010 Sep 28	 ↓1%	
	STEL SGX-ST	Bullish 2010 Sep 28	 ↑1%	
	MANH SGX-ST	Bullish 2010 Sep 20	 ↑22%	
	GOOG NASDAQ	Bullish 2010 Sep 16	 ↑10%	

[Show All Instruments](#) **Add an Instrument**

Conclusion

We hope you have found this document useful. ChartSense powered by Recognia will provide you with unique investment analysis that will help in your investments and trading decisions.

The tools are set up in such a way that you can easily navigate through to quickly find trade ideas, validate recent trade opportunities, or have it automatically monitor your stocks for you.

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