

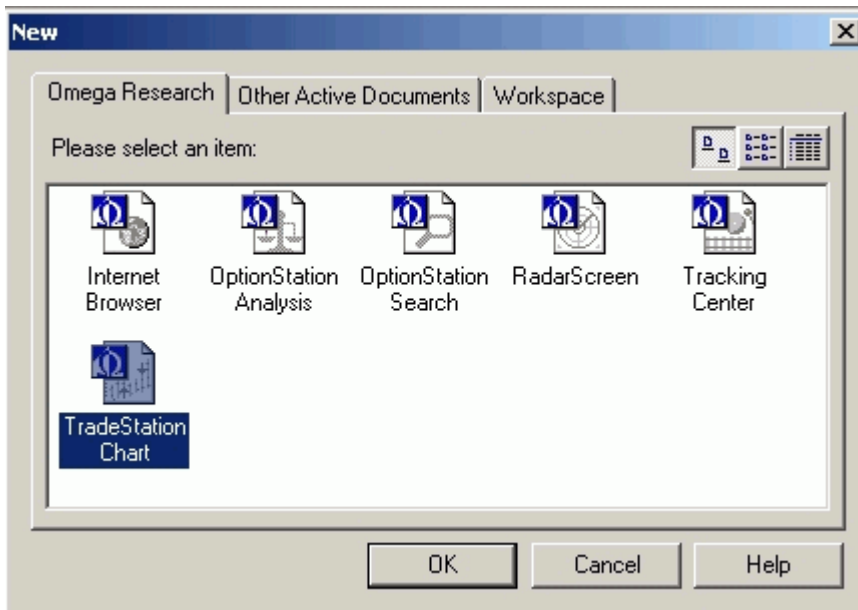
Creating a Custom Symbol List in TradeStation 2000i



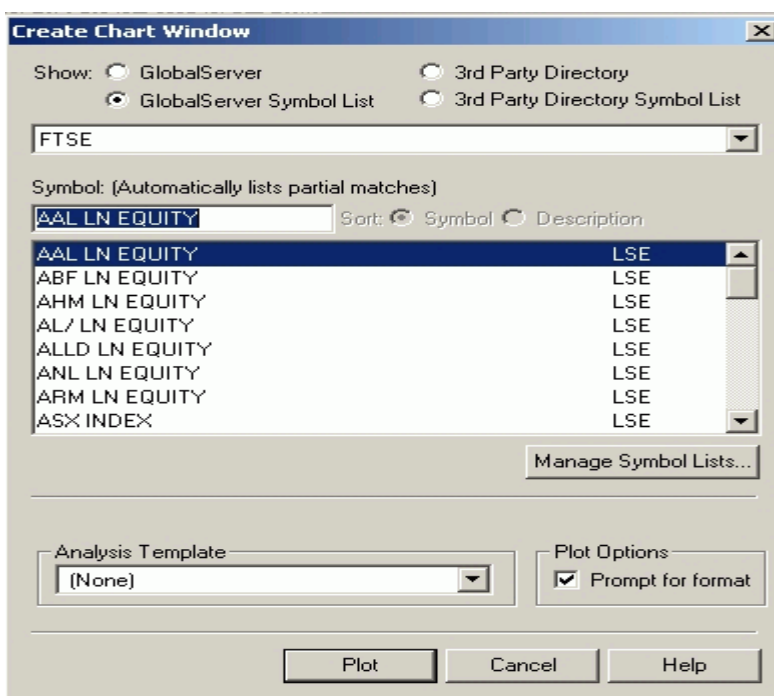
Custom Symbol Lists are very useful when you want to apply a single technical analysis “template” or strategy across a basket of securities (e.g., an industry sector, or portfolio), and visualise the results by scrolling through the list in a single chart window.

In the same way, Custom Symbol Lists can be used in conjunction with the Workspace assistant (if you are not already using RadarScreen in ProSuite 2000i), to identify and list all securities that are meeting your technical analysis and/or strategy criteria.

1. With a TradeStation 2000i workspace open, go to **File/New** and select TradeStation Chart. **Click OK**.



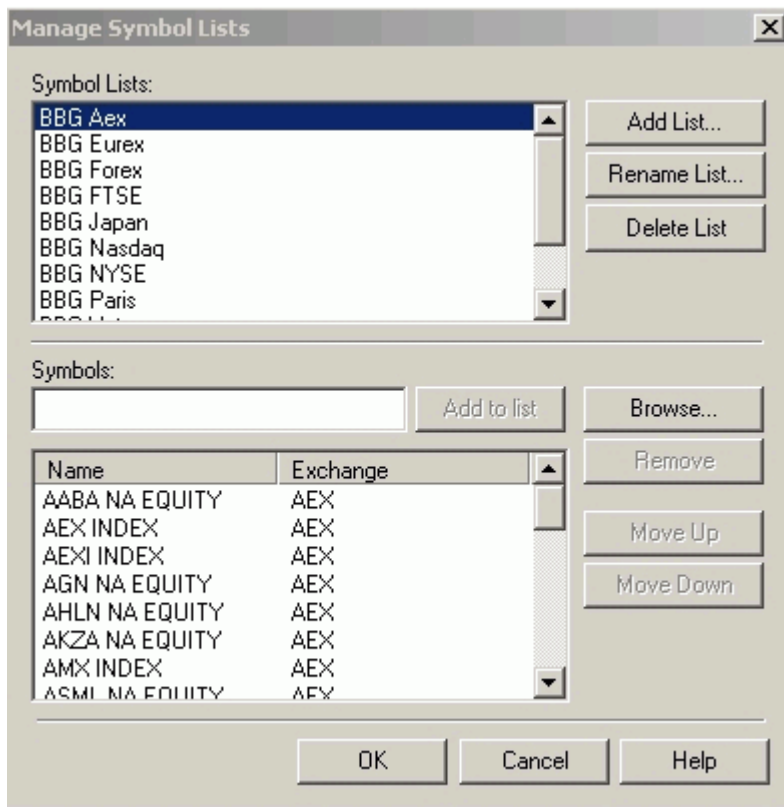
2. In the **Create Chart Window**, click on radio button **GlobalServer Symbol List**. Disregard any tickers that are not usually found in your portfolio, simply click on the button **Manage Symbol Lists**.



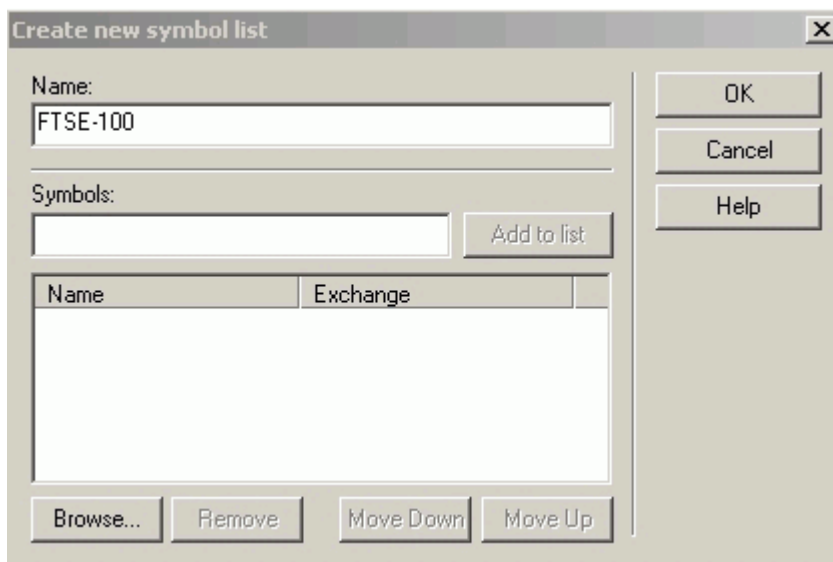
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3. In the **Manage Symbol Lists** window click on **Add List...** This will open the **Create New Symbol List** window.



4. Give your list a **Name** (e.g. FTSE-100), then click on the **Browse...** button.



5. In the **Add Symbols** window select **Data Vendor** Bloomberg, **Category** Stock (or other relevant category), then type a star * into the **Find** field. This will temporarily clear the ticker list. Press **Backspace** on your keyboard to remove the star. You will now see the contents of your GlobalServer Portfolio (Bloomberg tickers).

Creating a Custom Symbol List in TradeStation 2000i



Add Symbols

Data Vendor:

Category:

Find: Symbol Description

Name	Description	Exchange
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OK Cancel Help

Add Symbols

Data Vendor:

Category:

Find:

Symbol Description

Name	Description	Exchange
AAL LN EQUITY	ANGLO AMERICAN PLC	LSE
ABF LN EQUITY	ASSOCIATED BRITISH FOODS PLC	LSE
AHM LN EQUITY	AMERSHAM PLC	LSE
AL/ LN EQUITY	ALLIANCE & LEICESTER PLC	LSE
ALLD LN EQUITY	ALLIED DOMECQ PLC	LSE
ANL LN EQUITY	ABBEY NATIONAL PLC	LSE
AUN LN EQUITY	ALLIANCE UNICHEM PLC	LSE
AV/ LN EQUITY	AVIVA PLC	LSE
AVZ LN EQUITY	AMVESCAP PLC	LSE
AZN LN EQUITY	ASTRAZENECA PLC	LSE
BA/ LN EQUITY	BAE SYSTEMS PLC	LSE
BAA LN EQUITY	BAA PLC	LSE
BARC LN EQUITY	BARCLAYS PLC	LSE
BATS LN EQUITY	BRITISH AMERICAN TOBACCO PLC	LSE
BAY LN EQUITY	BRITISH AIRWAYS PLC	LSE
BB/ LN EQUITY	BRADFORD & BINGLEY PLC	LSE

OK Cancel Help

6. Click on the column head **Exchange** (or other) to sort the list. This makes it easier to select the desired tickers. From the top of the list **use the mouse** to select the first ticker in your list. Press the **Shift** key on your keyboard and scroll to the end of the list of tickers you want to add. **Click your mouse** on the last ticker in your list. This will highlight all the tickers to be added. **Click OK** to add the selected tickers to the symbol list.

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The 'Add Symbols' dialog box in TradeStation 2000i. It features a 'Data Vendor' dropdown set to 'Bloomberg', a 'Category' dropdown set to 'Stock', and a 'Find' text box. Below these are radio buttons for 'Symbol' (selected) and 'Description'. A table lists various stock symbols and their descriptions, with columns for 'Name', 'Description', and 'Exchange'. The table is currently displaying a list of LSE (London Stock Exchange) equities. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Name	Description	Exchange
SN/LN EQUITY	SMITH & NEPHEW PLC	LSE
SPW LN EQUITY	SCOTTISH POWER PLC	LSE
SSE LN EQUITY	SCOTTISH & SOUTHERN ENERGY	LSE
STAN LN EQUITY	STANDARD CHARTERED PLC	LSE
SVT LN EQUITY	SEVERN TRENT PLC	LSE
SXC LN EQUITY	SIX CONTINENTS PLC ORD 28P	LSE
TOMK LN EQUITY	TOMKINS PLC	LSE
TSCO LN EQUITY	TESCO PLC	LSE
ULVR LN EQUITY	UNILEVER PLC	LSE
UU/LN EQUITY	UNITED UTILITIES PLC	LSE
VOD LN EQUITY	VODAFONE GROUP PLC	LSE
WOS LN EQUITY	WOLSELEY PLC ORD 25P	LSE
WPP LN EQUITY	WPP GROUP PLC	LSE
WTB LN EQUITY	WHITBREAD PLC	LSE
XTA LN EQUITY	XSTRATA PLC	LSE
BBA PL EQUITY	BA-FAB VIDROS BARBOSA & ALME	LISSE

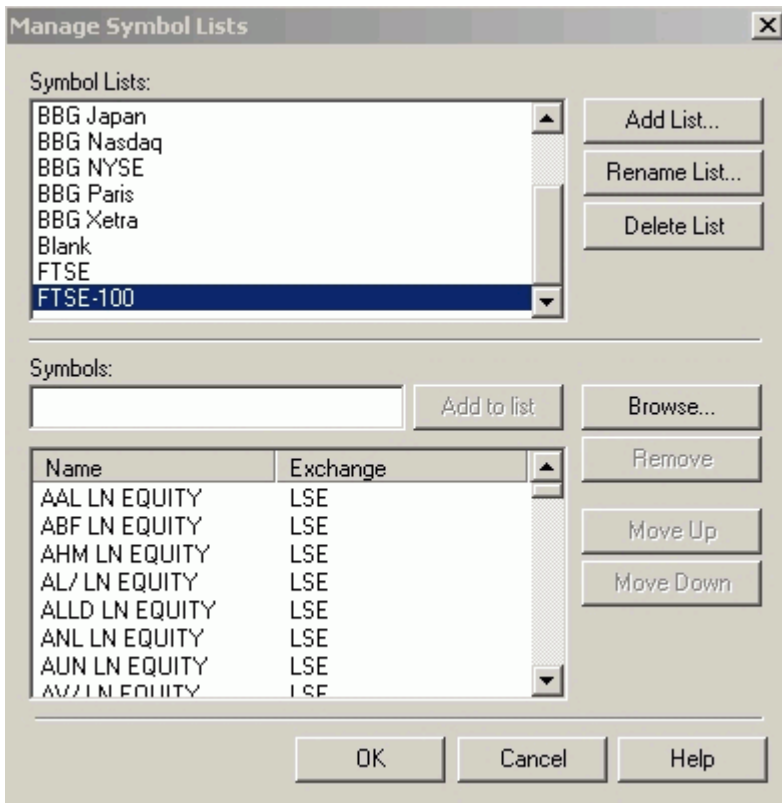
7. The **Create new symbol list** window will appear again showing the list of tickers you have added to the FTSE-100 symbol list. **Click OK** to save the list.

The 'Create new symbol list' dialog box. It has a 'Name' text box containing 'FTSE-100'. Below it is a 'Symbols' text box with an 'Add to list' button. A table lists symbols and their exchanges. At the bottom are 'Browse...', 'Remove', 'Move Down', and 'Move Up' buttons. On the right side are 'OK', 'Cancel', and 'Help' buttons.

Name	Exchange
AAL LN EQUITY	LSE
ABF LN EQUITY	LSE
AHM LN EQUITY	LSE
AL/LN EQUITY	LSE
ALLD LN EQUITY	LSE
ANL LN EQUITY	LSE

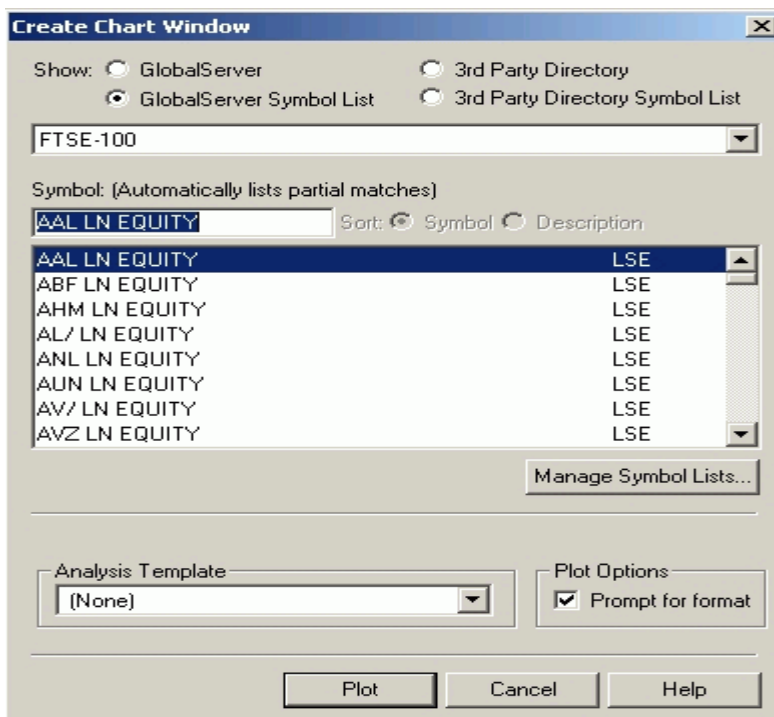
8. The **Manage symbol Lists** window will re-appear. In the **Symbol Lists:** pane you will see the new custom symbol list you have just created. If you cannot immediately see the list, scroll down to locate it.

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9. Click on **FTSE-100** to select it, and the list of tickers appears in the lower pane. You can change the order of tickers in the list by using the **Move Up** or **Move Down** buttons. To Remove tickers from the list, select the ticker in the lower pane and click on the **Remove** button. To add additional tickers to the list, click on **Browse...** and repeat actions from section 5 above.

10. To continue, and create a chart from your custom symbol list, **click OK**. You will be returned to the **Create Chart Window**.



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11. At first, the new list will not appear in the GlobalServer Symbol List. You must first **click on the GlobalServer radio button**, and then click back on the GlobalServer Symbol List button. This process loads the new list into the pane. If necessary, use the drop down window to locate the new symbol list. Now you can click **Plot** and begin charting from the symbol list.

12 When you have created a chart from the GlobalServer Symbol list, you can apply indicators and/or studies to it.



By clicking on the **Load Next Symbol**, or **Load Previous Symbol** buttons in your TradeStation ToolBar, the same studies and/or indicators will be applied to each security as it appears in the chart window.

This is also a useful way to set up charts for processing strategies, study alerts, or drawing tool alerts using the **Workspace Assistant**. For information about the Workspace Assistant see the support document entitled *Workspace Assistant*.