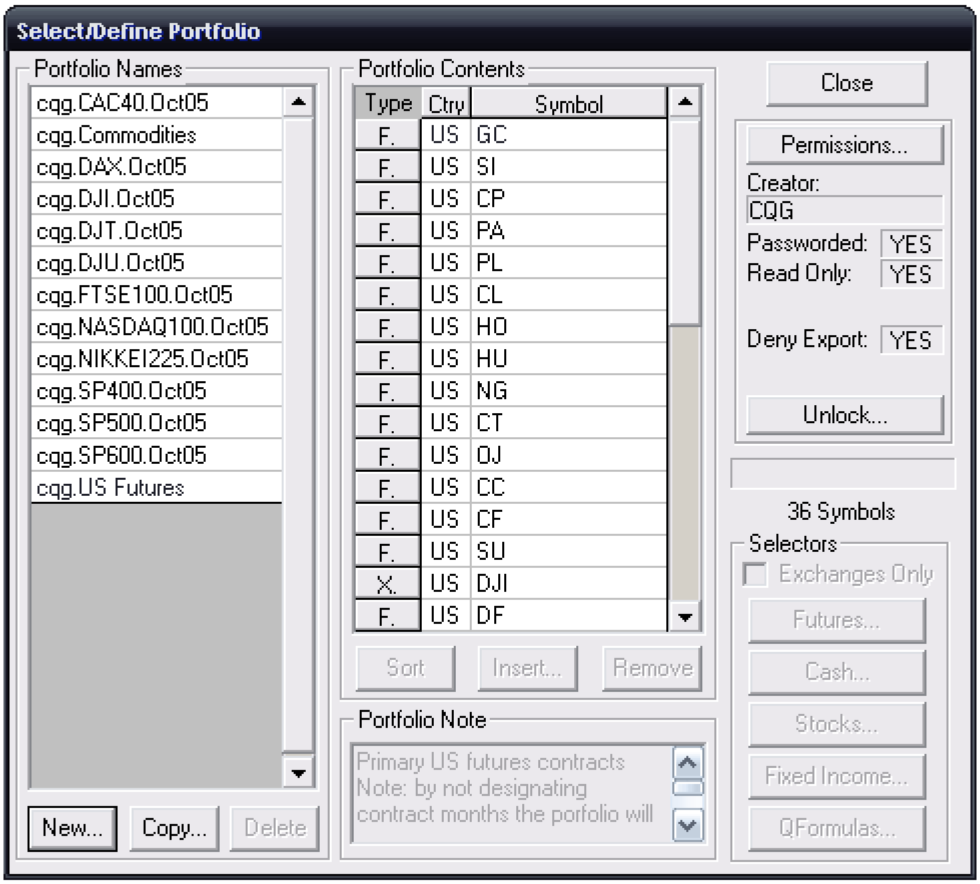
Defining Portfolios

Portfolios contain the issues that can be used in both the **Market Scan** and **Signal Evaluator** applications. Defining a portfolio involves entering a portfolio name, specifying the portfolio contents, as well as entering a portfolio note and optionally establishing security provisions.

Click the **Portfolio** button to open the **Define Portfolios** window.



You can name a portfolio, copy an existing portfolio, or insert issues into a portfolio.

Portfolio names identify and select individual portfolios. The Portfolio Names list displays the names of portfolios that have already been defined.

Naming a New Portfolio

1. Click the **New** button. This displays the **New Portfolio** window.
2. Enter a name for the new portfolio.
3. Click **OK**.

Copying a Portfolio

You may also want to use an old portfolio and modify it. The fastest way to do that is to copy the old portfolio and then make any insertions or deletions.

1. Select a portfolio from the **Define Portfolios** window
2. Click the **Copy** button.
3. Enter a name for the new portfolio.
4. Click the **OK** button.

Inserting Issues into a Portfolio

1. Select the portfolio into which the issue should be inserted.
2. Click the **Insert** button in the **Define Portfolios** window.
3. Enter the symbol for the new issue.
4. Click the **OK** button to enter the symbol into the portfolio and close the **Insert an Issue** window.

Changing a Portfolio Name

1. Click the **Portfolio** button**.**
2. Double-click the name of the portfolio name to be changed.
3. Enter the new name.

Specifying the Portfolio Contents

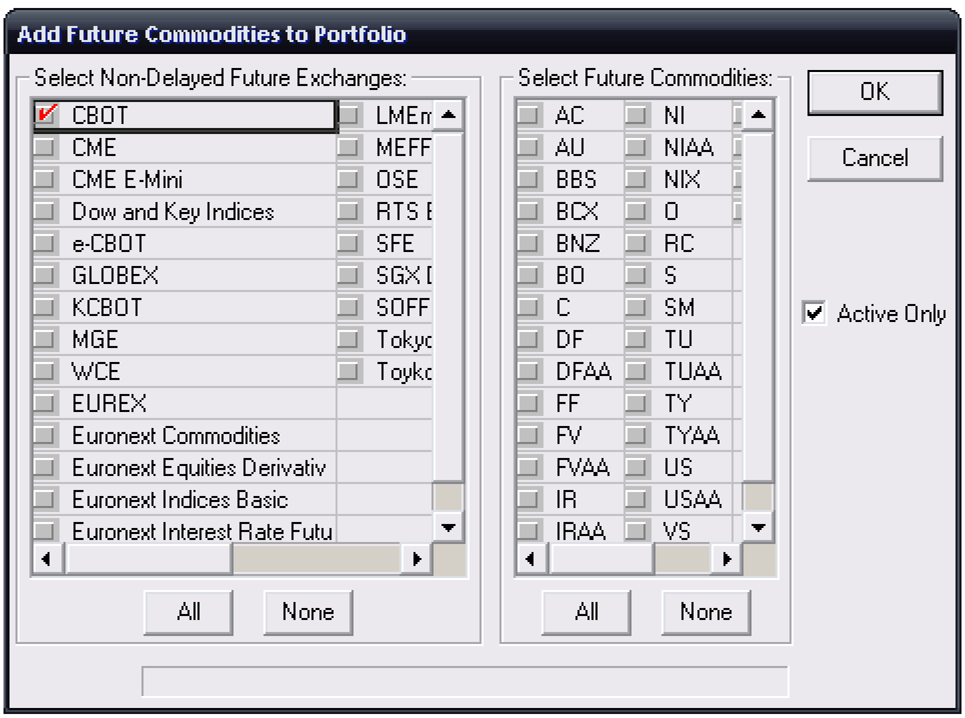
The **Portfolio Contents** list contains the symbols for the **Futures**, **Stocks**, and **Cash** instruments that are scanned when the particular portfolio is selected.

The **Portfolio Contents** section is empty when a new portfolio name is initially selected. The selector buttons provide a quick mechanism for populating the portfolio with multiple issues.

Adding Futures Exchanges and Contracts

- To add a futures exchange, click the exchange name. The symbols for that exchange are displayed.
- To add all futures exchanges, click the **All** button.
- To select the commodities to be included, click the commodity symbols.
- To select all the commodities for the selected exchange(s), click the **All** button.

Selecting the **Active Only** checkbox causes only the most active contract of the selected commodities include in the scan. Otherwise, all months for the selected commodities are included.



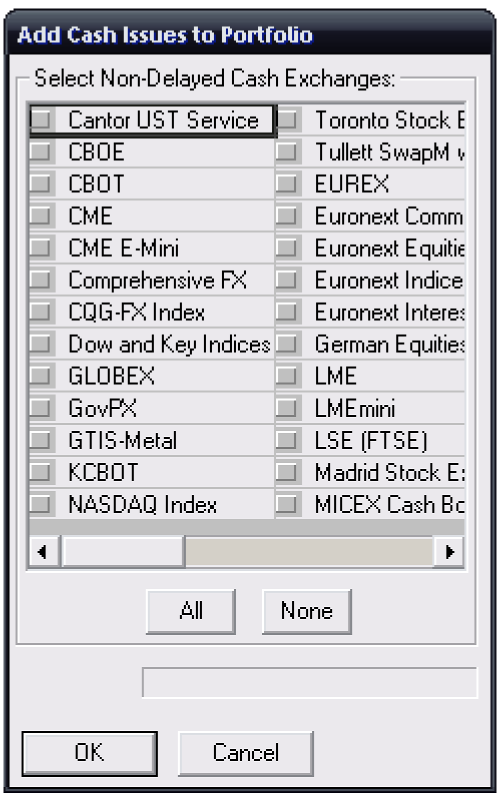
To add to the portfolio

Individual, not-most-active months, may also be added to the portfolio:

1. Click the **Portfolio** button.
2. Click the **Insert** button.
3. Enter the issue symbol.
4. Click the **OK** button.
5. Click the **None** button to clear all previously selected commodities.
6. Select **OK** to include the selected contracts in the **Market Scan** portfolio and close the **Add Future Commodities to Portfolio** window

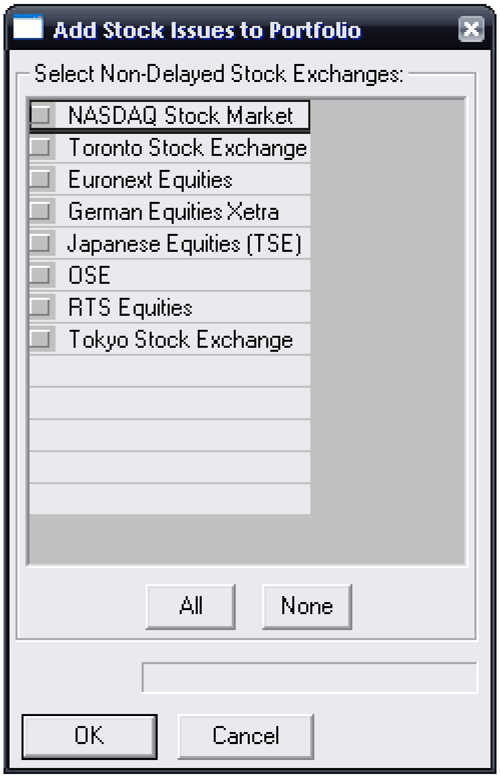
Adding Cash Contracts

- To add a cash exchange/data provider, click the exchange name.
- To add all cash exchanges, click the **All** button.



Adding Stocks

- To add a stock exchange, click the exchange name.
- To add all stock exchanges, click the **All** button.



Adding Fixed Income

- To add a Fixed Income exchange, click the exchange name.
- To add all Fixed Income exchanges, click the **All** button.