

# Getting Started with Recognia<sup>®</sup> Technical Insight<sup>™</sup>

## *A Guide for End-Users*

### Introduction

With thousands of financial instruments to choose from, how do you find trade opportunities that make sense for you? While stock values fluctuate, how do you know when a price move matters? With no end to investment commentary available, where can you get unbiased feedback on the trades that you're considering? Recognia's Technical Insight will provide you with unique investment analysis that will help in your investments and trading decisions.

Technical Insight has something to offer seasoned as well as novice investors and traders. Technical Insight components provide a powerful blend of power and usability, allowing you to quickly find trade ideas, validate recent trade opportunities, and enable automatic stock monitoring.

While working through this guide, it is important to note that your broker's implementation of the Recognia platform may vary slightly from the screen images reproduced here. The underlying principles, however, remain the same.

### What this guide covers

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

You will learn how to:

<a href="#">Find trade ideas</a> .....	<a href="#">Page 2</a>
<a href="#">Validate recent picks and choose entry/exit points</a> .....	<a href="#">Page 3</a>
<a href="#">Monitor stocks</a> .....	<a href="#">Page 6</a>

## FINDING TRADE IDEAS

Discovering trade ideas with Recognia Technical Insight is fast, easy, and requires only a few simple steps. In a matter of minutes, you'll be on your way to uncovering a universe of trade ideas based on your own investing or trading preferences.

Within the Technical Insight **OVERVIEW** screen, there are **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 popup window appears listing important information about that stock, including the type of technical event that has occurred, the date it occurred, and more.

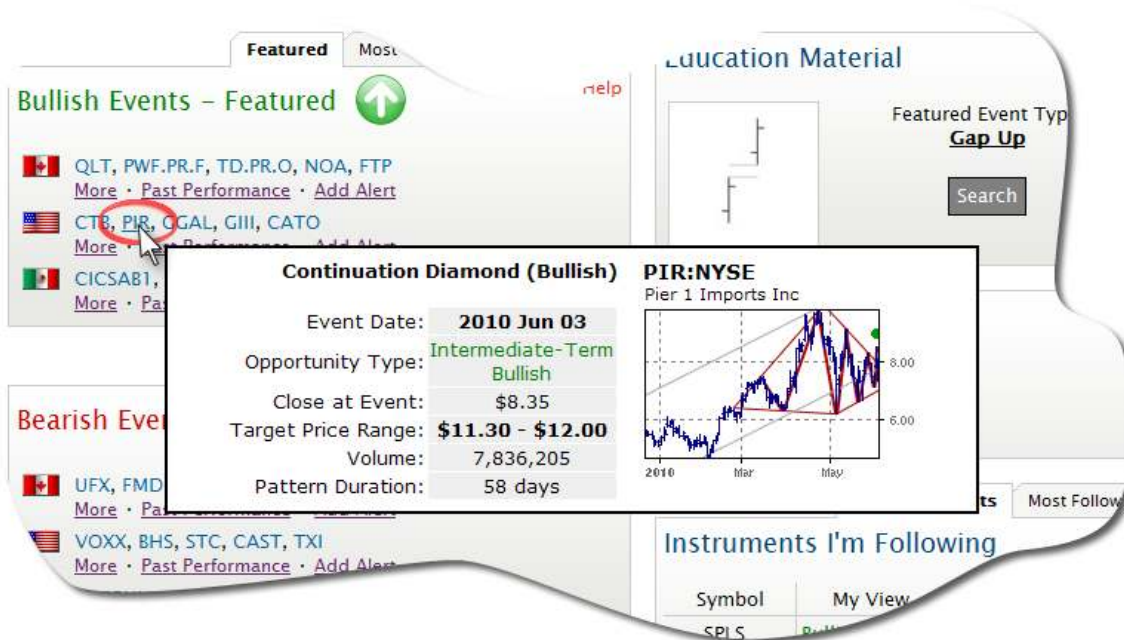


Figure 1: Popup Information on Featured Technical Events

These panels highlight stocks that are poised to move based on recently formed chart patterns and other preselected 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.

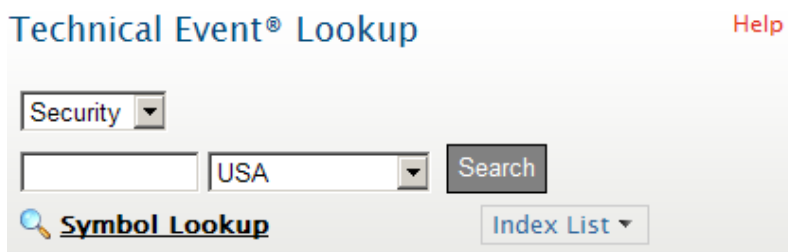
## VALIDATING STOCKS OF INTEREST AND CHOOSING ENTRY/EXIT POINTS

Before you make a trade, use Recognia Technical Insight 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. Technical analysis is just one source of information to consider when making a trading or investment decision. Investors may also consider other types of investment research such as fundamental analysis which is available in Recognia’s Strategy Builder product.



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<sup>®</sup> 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.

**3M Co (MMM:NYSE)**  
 Industry: Manufacturing  
 Competitors: GE:NYSE [Add Competitor](#)

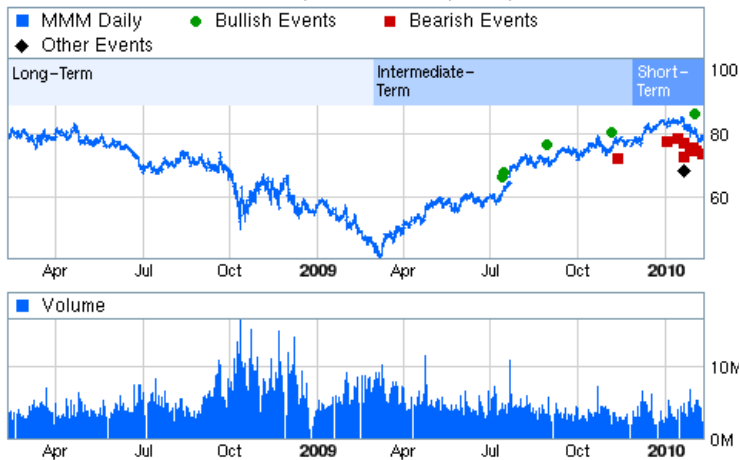
Trade [Follow Instrument](#)  
[Add Alert](#)

Select your trading horizon.

**Summary** Short-Term Intermediate-Term Long-Term

**Last Trade:** \$78.62 @ 2010-02-10 16:00:00  
 All data delayed at least 15 minutes or 20 minutes

[Price Bars](#) | [Candlesticks](#) | [Line](#) | [Mountain](#)



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**Highlights**

Technical Events

**5 bullish** – closest target \$79.00–\$82.00  
**9 bearish** – closest target \$76.80–\$77.40

See table below for details. This page shows active events – view [historical lookup](#) for more.

Support found at: **\$70.25**  
Resistance found at: **\$78.66**

Based on 500 bars. [Customize on chart](#)

Trailing Stop

For long position: **\$72.88**  
 For short position: **\$82.50**

Based on [Recognia Trailing Stop](#) ("medium") assuming position entered at last close price. Stops are updated with each new close price. [Customize on chart](#)

Recognia 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.

[View My Alerts](#)

[Delivery Options](#)

### Step 3: Alert Details

*Securities from Any US Exchange*

Price and Volume			
Price:	Min:	<input type="text"/>	Max: <input type="text"/>
Volume:	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)
More Conditions			
<input type="checkbox"/> Price is <input type="text" value="above"/> the <input type="text" value="200"/> day moving average (optional: by at least <input type="text"/> %).			

## MONITORING STOCKS

As the market or your own circumstances change, you may need to make changes in your investments. For example, when stocks rise or fall, the percentage of assets you have in stocks rises or falls accordingly, which could put your portfolio out of balance. Or something in your life may change, making you less comfortable with the way you've allocated your assets. To make sure you're still on target with your investment goals, you need to check the stocks within your portfolio often - but who has the time to monitor their stocks on a daily basis? Good news! Recognia's Technical Insight 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;

#### 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.

<b>Alert Name</b>
Name: <input type="text" value="New Alert"/>
<b>Alert Type</b>
<b>New Opportunities:</b>
<input checked="" type="radio"/> Alert me about new opportunities.
<b>Watch List:</b>
<input type="radio"/> Alert me about Technical Event® opportunities for symbols of interest.
<b>Specific Security:</b>
<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.
<b>Stops:</b>
<input type="radio"/> Alert me when the instrument's price crosses a stop-loss level.
<b>Screener:</b>
<input type="radio"/> Alert me about changes to a screen's top results.

### 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="checkbox"/> ETFs Only
Exchange:	USA
Industry:	Any

<< Previous

Next >>

### Step 3: Alert Details

Securities from Any US Exchange

Price and Volume	
Price:	Min: <input type="text"/> Max: <input type="text"/>
Volume:	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:	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)
More Conditions	
<input type="checkbox"/> Price is <input type="text"/> above the <input type="text"/> day moving average (optional: by at least <input type="text"/> %).	

<< Previous

Finish

2. The second way to have automatic monitoring set up is to 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!

My View:  on    (YYYY-MM-DD)



Note:












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.

 [Follow Instrument](#)  
 [Add Alert](#)

My Instruments		Most Followed	
<b>Instruments I'm Following</b> <span style="float: right;">Help</span>			
Symbol	My View	Performance	Delete
 KARU BSE	<b>Bullish</b> 2010 Mar 01	 ↑ 9%	
 TATA BSE	<b>Bullish</b> 2010 Mar 01	 ↑ 3%	
 BOM NYSE	<b>Bearish</b> 2010 Feb 05	 ↓ 28%	
 MMM NYSE	<b>Bullish</b> 2009 Dec 13	 ↓ 0%	
<input type="button" value="Add an Instrument"/>			

## Conclusion

We hope you have found this document useful. Recognia's Technical Insight 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.

## Where to find more information

Click the “**HELP**” link near the top right of the page. This will bring up additional tips and guidelines on using Technical Insight, as well as a list of Frequently Asked Questions (FAQ)

You may also visit Recognia's resource centre on <http://www.recognia.com/onlinebrokers/resources-investors> for additional information on Technical Insight and trader's reference material.