

RECOGNIZE OPPORTUNITY. REALIZE PROFIT.



## The Royal Treatment at TradeKing

At the five-year mark, when many emerging companies are just starting to find their niche, TradeKing is already a player. In its brief history, TradeKing has won several top industry honors:

- In 2008 and 2009, TradeKing received the maximum five-star rating for customer service and for the quality of trading tools in SmartMoney's broker surveys.
- These same SmartMoney surveys also ranked TradeKing the number one discount broker in 2007 and number one in customer service in 2008.
- TradeKing has been awarded four out of five stars for three straight years in Barron's ranking of online brokers.

*What's behind their success?*

For starters, it's TradeKing's philosophy. As one executive says, "We believe that investors – from rookies to experts – want more control over their financial future, and we have provided them with a trusted place to learn and grow so they can have just that..."

*But it's more than that.*

TradeKing has created an ecosystem of service and tools that helps make their clients better, faster, and smarter investors and traders.

### *The Challenge*

The team at TradeKing has always believed that to make the right trades, investors need the right tools.

Those tools would collect and condense reams of complicated data into information that can be understood by the sophisticated as well as the novice traders. Tools that would also identify possible trade opportunities and tools would include educational materials to allow clients to learn and grow as investors.

By providing the right tools, TradeKing could keep ahead of the competition to serve the growing number of people moving online to manage their own portfolios.

*"Our clients love your product – it's an important part of what makes them happy with TradeKing, so thank you."*

*Donato A. Montanaro,  
Chair and CEO,  
TradeKing.*

### *The Requirements*

- Professional-level technical analysis tools
- Actionable investment research
- Educational components to explain technical terms and chart patterns
- Products to address a range of investor type/styles

- Ability to backtest performance of one's strategy

## *The Solution*

In 2006, not long after the company launched, TradeKing chose Recognia's flagship product Technical Insight as one of its core investment research tools. Technical Insight is an online investment research tool that lets investors look at the universe of instruments and – based on chosen filters – get lists of trade ideas that fit their selected criteria.

More specifically, Technical Insights scans more than 60,000 equities worldwide and evaluates each for classic chart patterns, technical indicators and oscillators. It then alerts users to trade ideas that are easy to interpret and act upon.

Throughout the process, Technical Insights offers in-context education to explain chart patterns and whether they are relevant to the selected trading strategies.

When Recognia launched Strategy Builder several years later, TradeKing was again one of the first customers to deploy it.

With Strategy Builder investors can easily create and customize investment strategies using multi-factor models based on both fundamental and technical analysis. Investors can choose from a library of pre-built strategies or mix and match components to build their own strategies. One of Strategy Builder's key features is its support of backtesting that lets investors test their strategies before committing them, thereby adding another layer of trading confidence.

For TradeKing, Recognia's powerful investment research products are an integral part of their award-winning service offering and a perfect complement to the company's philosophy to give traders a place to learn, grow and succeed.

## *The Benefits*

- Engagement of traders at all levels through user-friendly and educational tools.
- Builds a foundation of understanding by providing in-context education on chart patterns and their relevance
- Enables traders to make more informed decisions thereby improving their chances of being successful.
- Boost trader's confidence of technical analysis by teaching them how the tool is automated as well as explaining charts that have emerged and what the implications may be.
- Provide a tool to develop and search for multi-fact investment strategies that meet the traders' specific preferences.
- Provide backtesting to boost trader confidence by allowing them to test strategies prior to committing.
- Saves traders hours and days of research time by automating the research process
- Fosters a community of traders with sharing capabilities

## *About Recognia*

Recognia is the industry leader providing actionable investment research products for on-line brokers. Our compelling product suite uses automated interpretation of technical, fundamental and value based analytics to increase account-holder engagement and boost trader confidence. Recognia helps to automate the investment decision making process by offering dynamic and action-oriented trading ideas for all trader types, in order to execute timely trade transactions with confidence. Recognia provides coverage of more than 50 exchanges worldwide, including stocks, equities, forex, indices, currencies and futures.

Founded in 2000, in Canada's National Capital region of Ottawa, Recognia today has more than 20 million provisioned accounts worldwide and our products service the largest and most successful on-line brokerage firms and institutions including; Bloomberg, Thomson-Reuters, Saxobank, E-Trade, HSBC, ICICI Direct and Reliance Money to name a few.