

Quickstart

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Quickstart

Fibotrader assists you with all your questions concerning securities. Many powerful tools offer both beginners and professional investors various opportunities for chart and portfolio analysis. Build, test and optimize your custom trading strategies including stops and profit targets. You can even create your own indices and have them update periodically.

Benefit from the wide range of supported Data Providers or from free quotes over the internet. View automatic updates through Realtime push data streams in all modules including charts.

The extensive and substantial help will answer most of your questions. If you encounter problems which cannot be solved, you get quick and professional help via E-Mail!

The development of Fibotrader is a ongoing process. The AutoUpdate Function allows you to update Fibotrader automatically.

Introduction

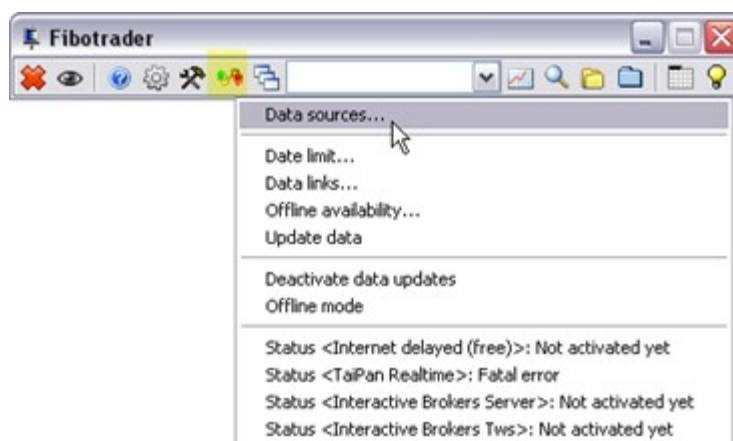
With Fibotrader you have a trading program which will help you in almost all parts of security management.



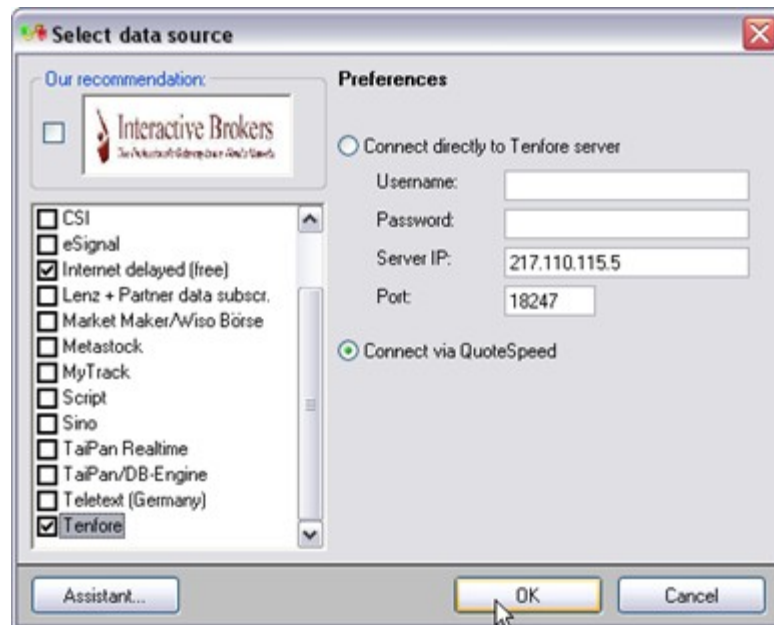
This introduction will give you an overview of the basic functions of the involved programs and inform you about the approach and different solutions for your tasks and fields of interest.

Data administration

Fibotrader offers a wide selection of data sources which is continuously enlarged. You reach it via Toolbar / icon Data management / Data sources.



Within the data source overview the desired source can be selected.

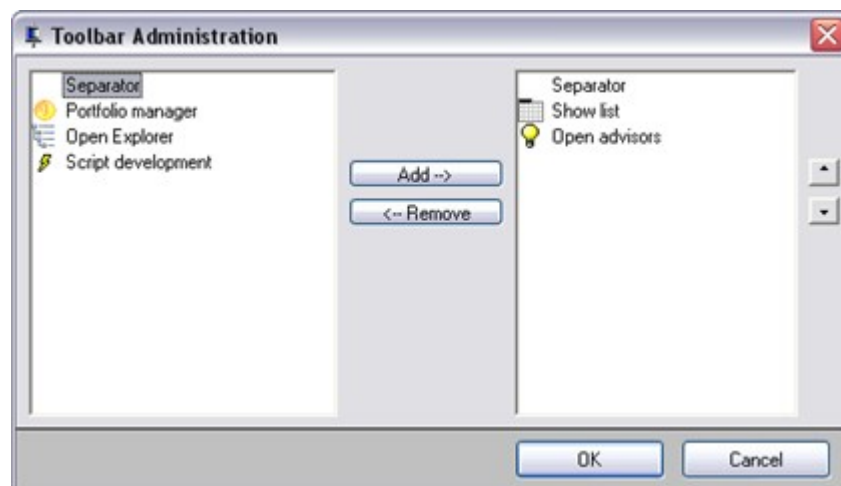


The Toolbar

The Toolbar contains the important core functions of this program. Here you can organize symbols and portfolios, as well as call the different modules and functions by clicking the icons.



You can configure the available icons by right-clicking the Toolbar and opening the Toolbar administration.



The functions from left to the right:

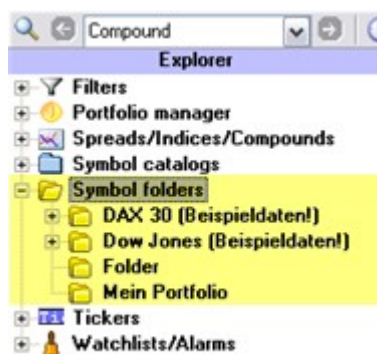
1. Close program
2. View mode: Here you can dock the Toolbar to the upper screen border or minimize or hide it temporarily. Additionally you can hide all open windows except the Toolbar to quickly access the desktop. This function is also available by right-clicking the eye.

3. Help
4. Preferences
5. Tools / Program modules
6. Data administration
7. Windows
8. Search
9. Chart
10. Start search or open search window
11. Folders (managed by yourself)
12. Catalogs (provided by the data vendor)
13. List module
14. Advisor

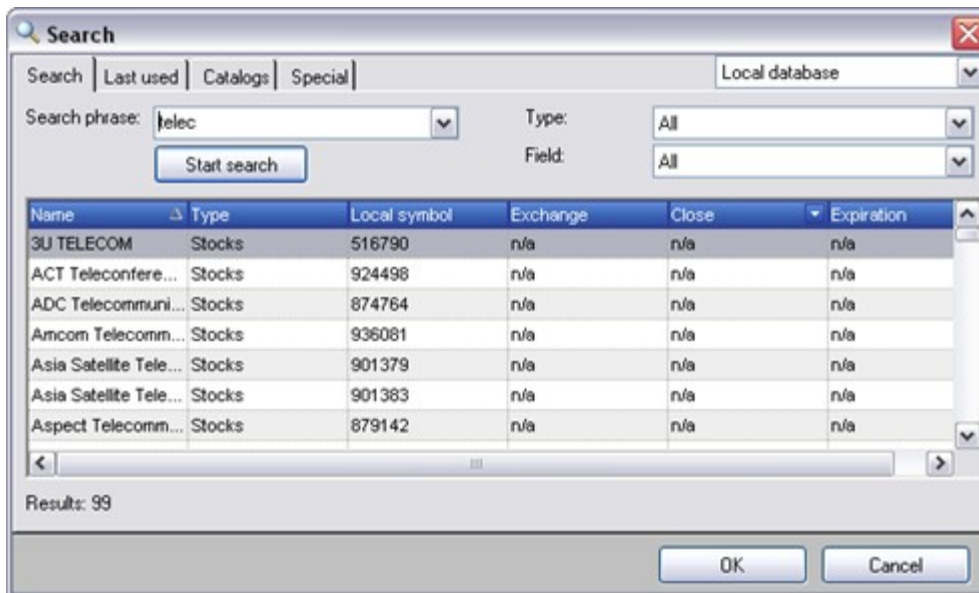
Securities management

The Symbol folders module in the Fibotrader explorer already contains the example folders DAX 30 and Dow Jones with EOD Data. You can create an unlimited number of folders and sub-folders. These can then contain your symbols.

Right click the module 'Symbol folders' within the explorer and choose 'New folder...' Enter a name and confirm. The folder is added.



You can add symbols to this folder by right clicking it. The options menu opens. Now select 'Add symbol', the search mask will be opened.



Enter a search word, start the search and select a hit. Click the button **OK**. The selected symbol is now copied to the new folder.

You also can copy symbols from other folders using two ways:
Choose the desired symbol and drag it into the new folder using the mouse. When you release the left mouse button a copy will be created in the folder.

Or right click the desired symbol and choose 'Copy to clipboard' (Alternative: Press F11). The clipboard window opens and shows the current content. You can copy more symbols or even folders to the clipboard the same way.



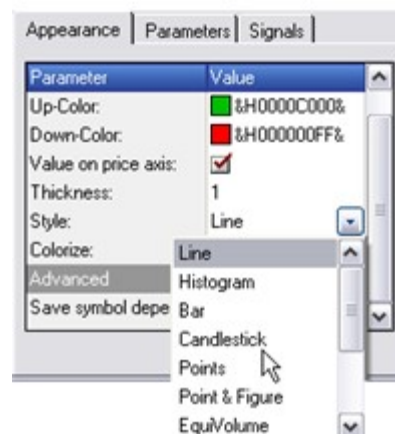
Now finish the process by right clicking the new folder and selecting 'Insert from clipboard'(Alternative: Press F12). All values from the clipboard are now copied to this folder.

Chart window structure

The chart window consists of three main components. In the middle is the big charting area, on the left the explorer and on the right the object tree where all the configuration can be done. There are vertical dividing buttons between the explorer, the object tree and the actual chart, which allows to show and hide the individual parts.



If you select an object in the object tree the configuration options of this object will be shown below. Here you can find e.g. the '**Appearance**' options with the available chart types.



Adding an indicator

Quickstart

Indicators can be added by right clicking an object in the object tree or by pushing the Add indicator button from the chart toolbar. A window opens showing all available indicators.



After selection of the desired indicator it will be calculated and shown in the chart.

Chart drawings

The chart module offers a wide variety of tools which allow to draw directly in the chart. These tools can also create signals in a lot of cases. From the draw tools menu you can choose the tool you want. In the chart window, press and hold the left mouse button, to start drawing. Release it, when done.

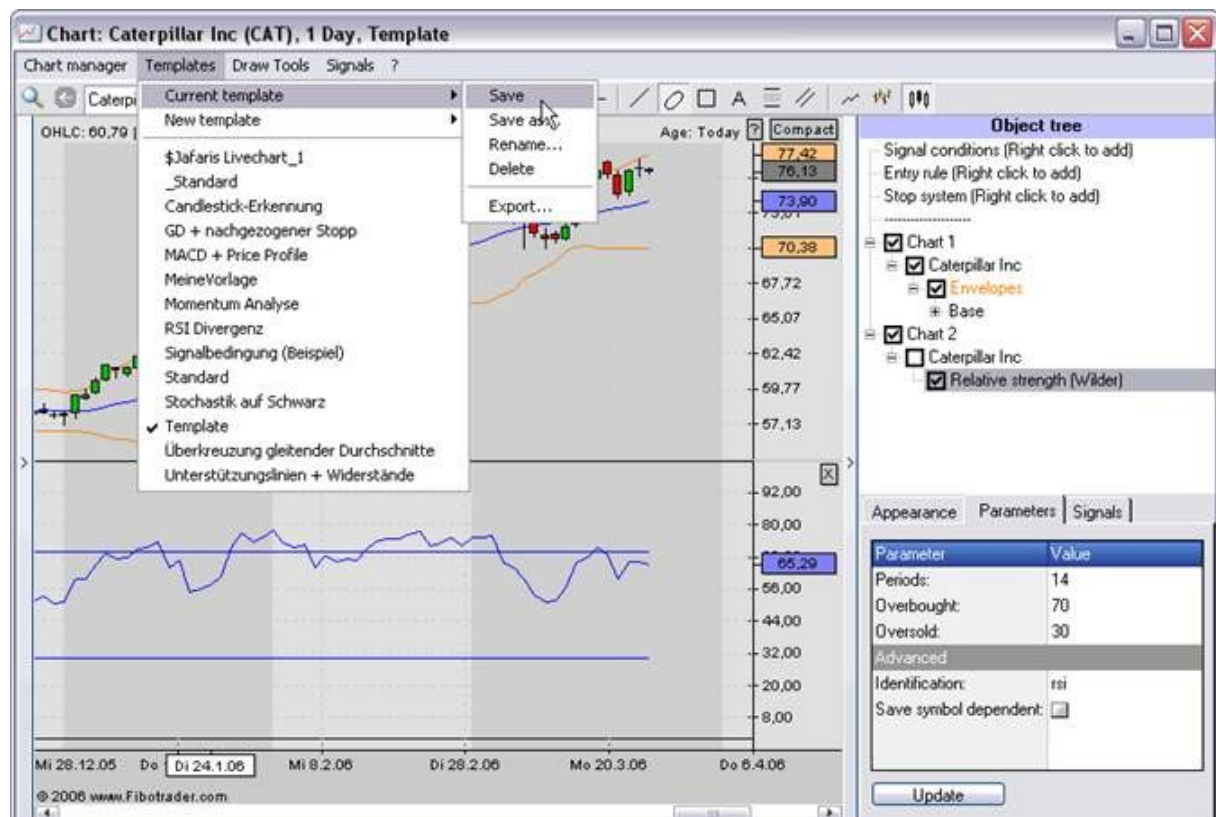


Drawings will be highlighted when moving the mouse above them. A couple of little circles will appear, which allow to modify, e.g. move, the drawing. Pressing the right mouse button on a highlighted drawing brings up a menu which shows additional options. To delete drawings either use this menu or press the delete key.

Drawings like the Phi-Ellipse have different adjustment options. These can be edited by right clicking the drawing or within the left configuration area by selecting the drawing in the object tree.

Saving chart templates

The current chart configuration can be stored for later use by using chart templates. Within a template all indicators, parameters and preferences are saved.



A template can be easily loaded with a single mouse click.

Trading signals

Many indicators can create trading signals. These represent buy and sell moments which are shown by green and red markings. If the mouse cursor is moved over a signal a dialog showing detail information appears.



The signal presentation can be configured for each indicator. Select the indicator in the object tree and change to the 'Signals' tab sheet. Here all signals can be (de-)activated. All signals from sub windows are always shown in the main chart and there combined.

The figure shows a dialog box with three tabs: 'Appearance', 'Parameters', and 'Signals'. The 'Signals' tab is active. It contains a table with the following data:

Parameter	Value
Buy signal:	<input checked="" type="checkbox"/>
Sell signal:	<input type="checkbox"/>

Below the table is an 'Advanced' section with the following parameters:

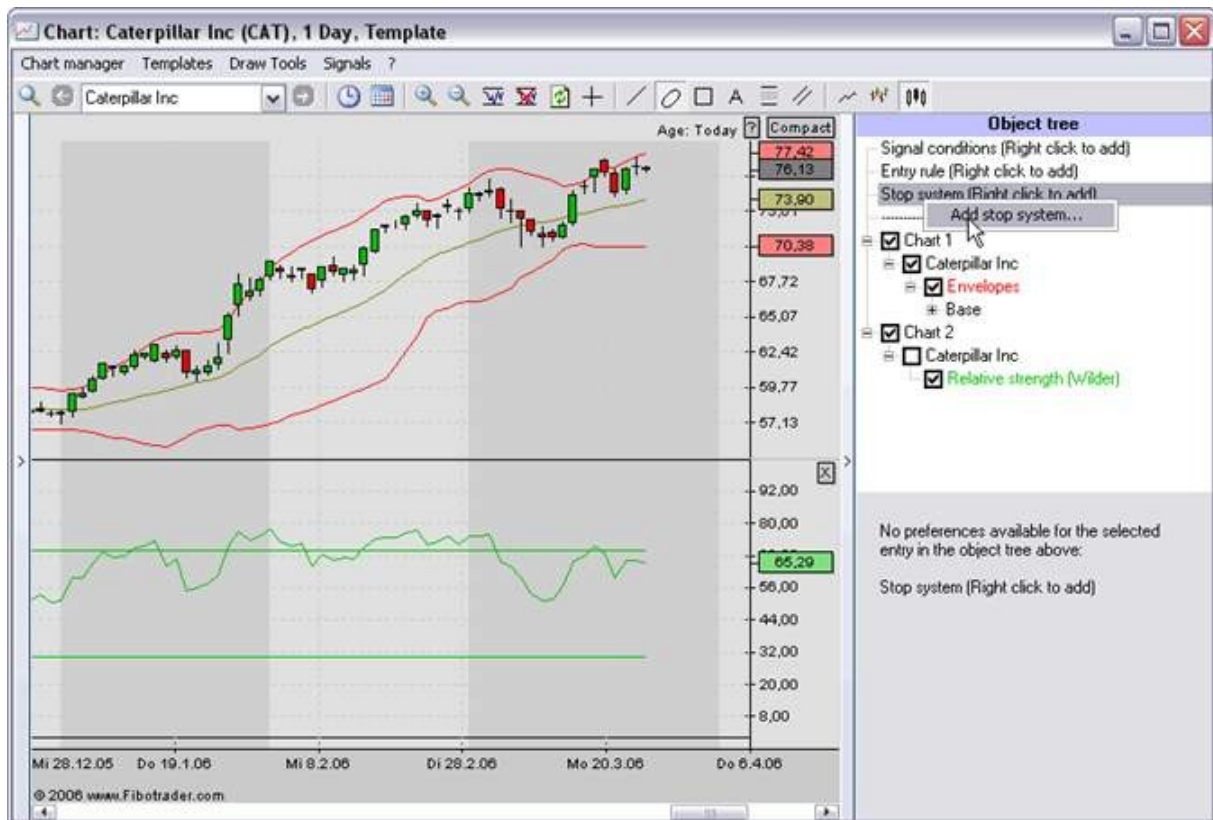
- Change sell to cover: ☐
- Invert signals: ☐
- Move to next open: ☐
- Priority: 0

At the bottom of the dialog is an 'Update' button.

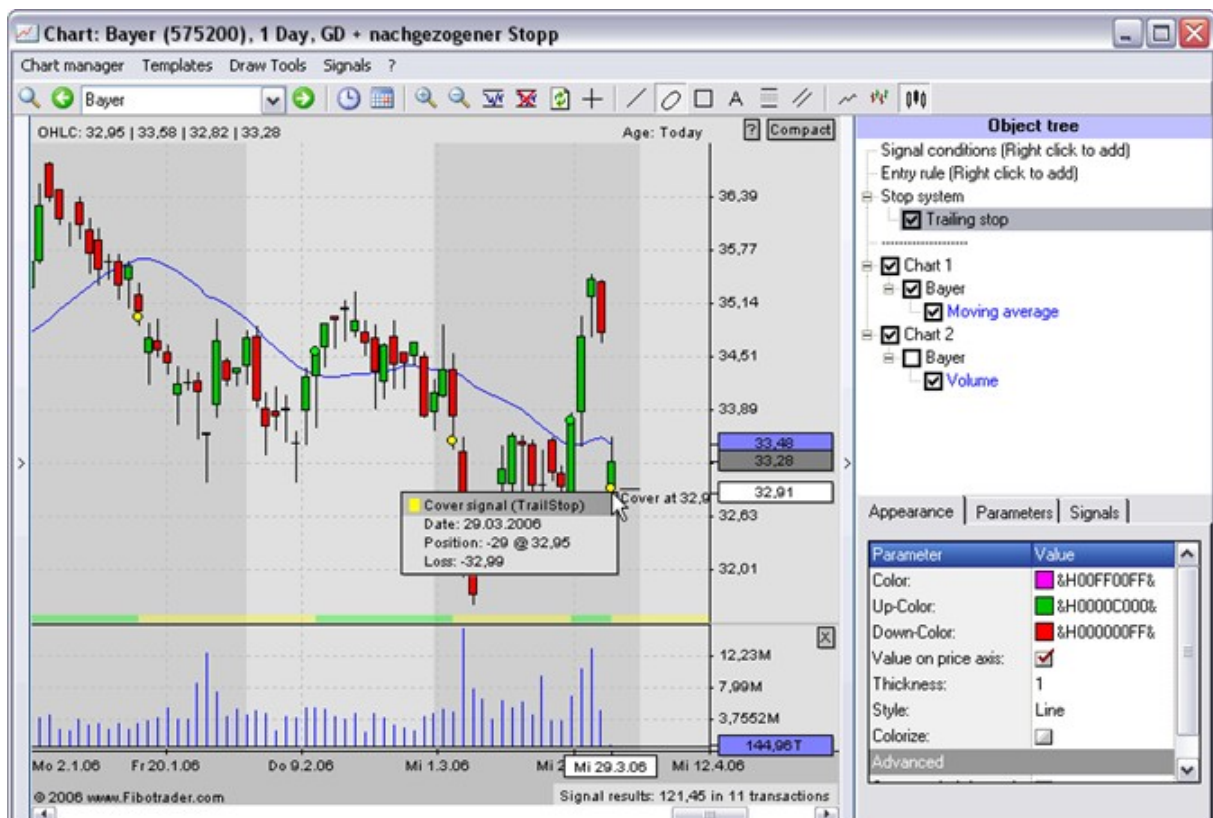
In the lower right corner of the chart the result achieved with the current strategy is shown. This contains profit / loss as well as the number of trades. Details of the calculation can be configured in backtesting sets in the Signals / Backtesting / Manage menu. Here the calculation of short signals is controlled as well as the preferences for position sizes and transaction costs.

There are different stop systems available. These are automatically processed after the indicator calculation. There for it is often useful to deactivate the indicators signals.

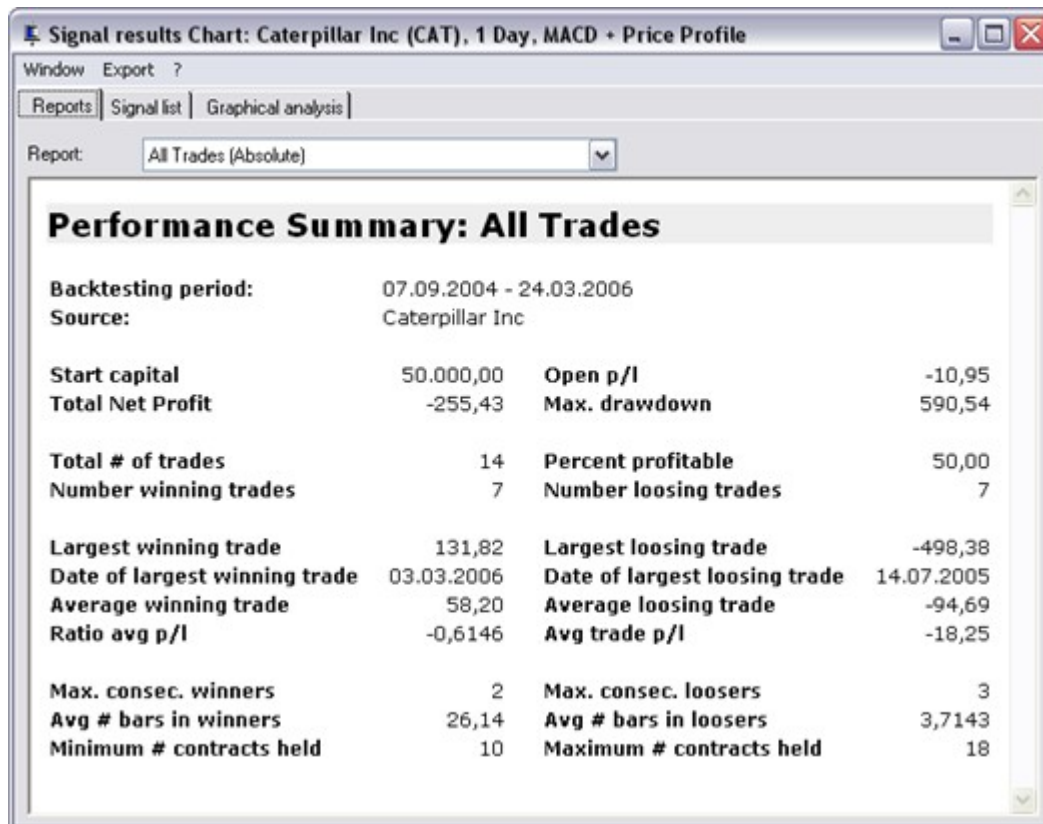
By right clicking at 'Stop system' you can add stop systems and profit targets.



Stops generate cover signals which are marked yellow within the chart.



Additionally to the short summary of the strategy results you can request a detailed evaluation. This can be done in the menu Signals / Results.

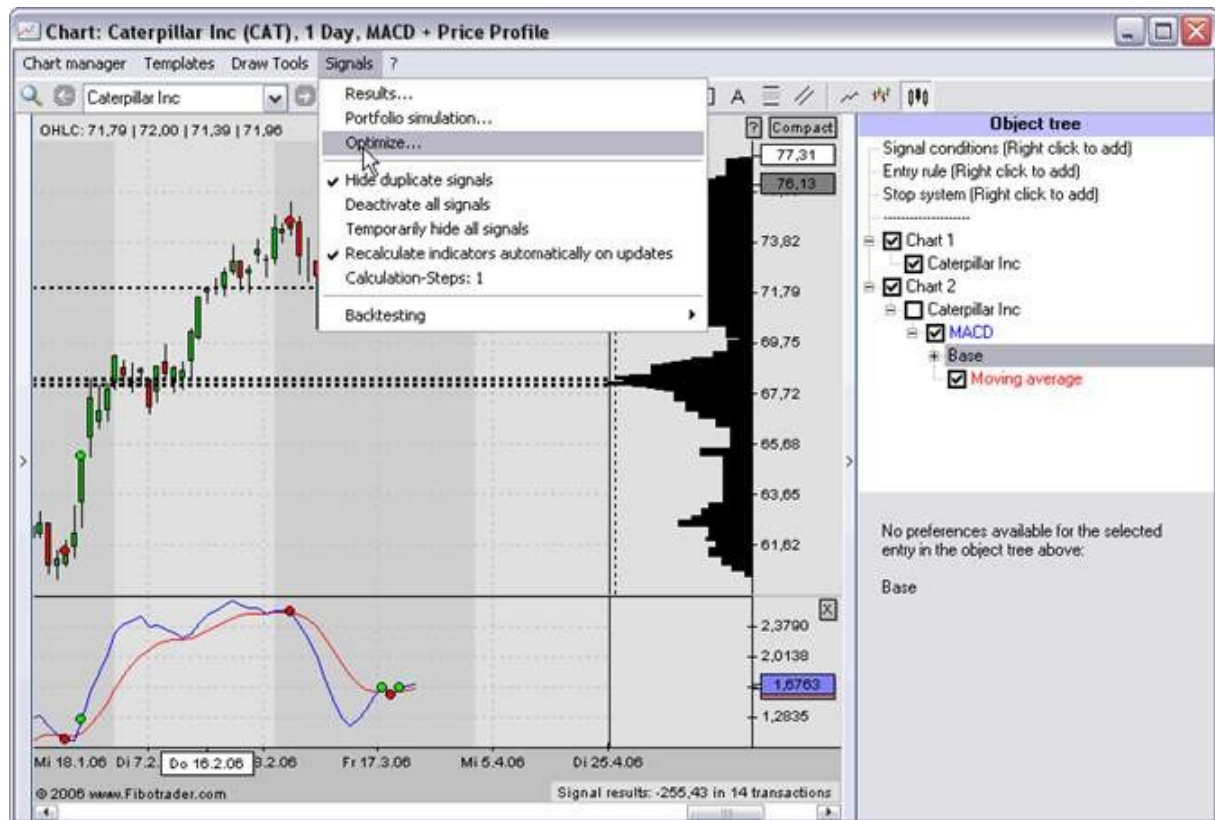


The evaluation is divided into three parts: Reports show the important facts in compressed form, the signal list shows all signals of the current strategy with detailed information and the graphical analysis offers a fast overview over the evolution of the equity chart and the profit / loss relation.

Optimization

The optimization tries to change the parameters of all indicators in the chart that way historical the maximized profit would have been reached.

The optimization is started in the menu Signals / Optimize.



Fibotrader automatically offers limits within which an optimization makes sense. These limits can be adjusted in the 'Optimization parameters' tab sheet. All indicators and their parameters contained in the current template are listed here. For each parameter a start value, step width and end value can be set. In the lower part of this window the complete step count is shown. By clicking **Start optimization** the process is activated.

After the optimization is finished the evaluation shows each tested parameter combination with reached profit, number of trades and drawdown. This view is already filtered.

Optimization assistant

Optimization ?

Results for: Caterpillar Inc

Profit	Drawdown	Transact. p...	Transactions	Drawdown/...	Test period	Profit per ...
-348,4414	592,457	10	20	-1,700306	0	-526,3633
-348,4414	592,457	10	20	-1,700306	0	-526,3633
-346,918	575,8125	10,5	21	-1,659794	0	-520,2852
-346,918	575,8125	10,5	21	-1,659794	0	-520,2852
-346,918	575,8125	10,5	21	-1,659794	0	-520,2852
-346,918	575,8125	10,5	21	-1,659794	0	-520,2852
-308,9023	533,9219	10,5	21	-1,728449	0	-482,2695
-308,9023	533,9219	10,5	21	-1,728449	0	-482,2695
-308,7617	554,0586	10	20	-1,794454	0	-486,6797
-308,7617	554,0586	10	20	-1,794454	0	-486,6797
-305,7617	551,0625	10	20	-1,802261	0	-483,6836
-305,7617	551,0625	10	20	-1,802261	0	-483,6836

Show best result Display in chart

New optimization Close

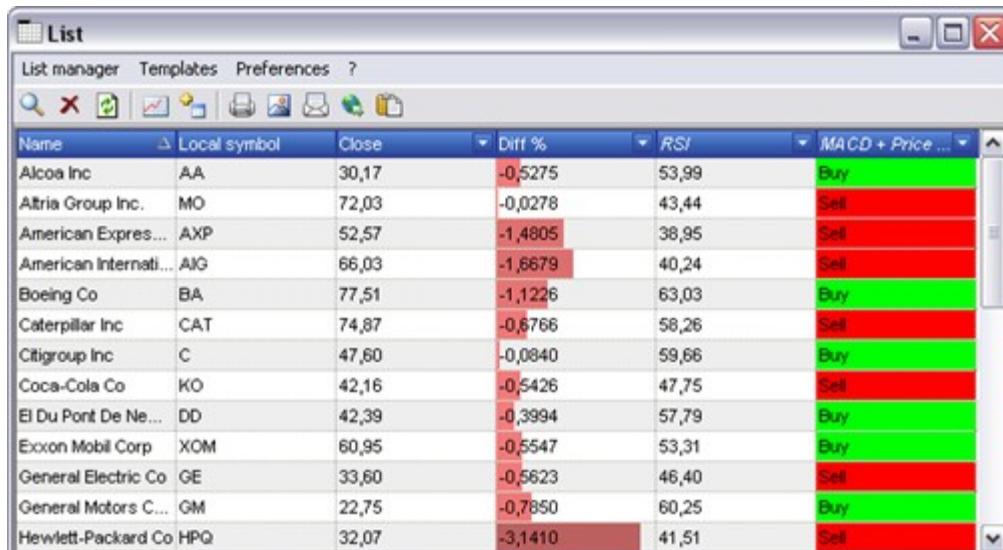
Quickstart

The filter preferences can be configured by selecting Optimization / Preferences. Here the minimum number of trades per year and other limits can be defined.

The best result is automatically marked green and loaded into the chart.

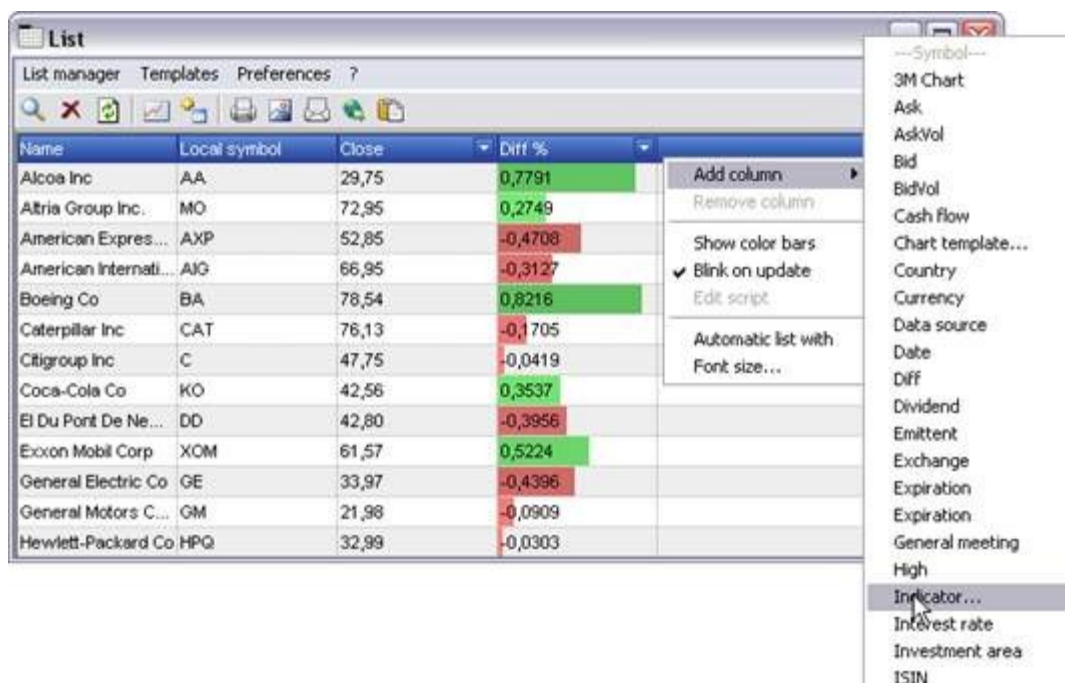
Using lists

Lists are a useful tool giving a fast overview. Quotes and also the state of trading systems and their current signals can be watched.



Name	Local symbol	Close	Diff %	RSI	MACD + Price ...
Alcoa Inc	AA	30,17	-0,5275	53,99	Buy
Altria Group Inc.	MO	72,03	-0,0278	43,44	Sell
American Expres...	AXP	52,57	-1,4805	38,95	Sell
American Internati...	AIG	66,03	-1,6679	40,24	Sell
Boeing Co	BA	77,51	-1,1226	63,03	Buy
Caterpillar Inc	CAT	74,87	-0,6766	58,26	Sell
Citigroup Inc	C	47,60	-0,0840	59,66	Buy
Coca-Cola Co	KO	42,16	-0,5426	47,75	Sell
El Du Pont De Ne...	DD	42,39	-0,3994	57,79	Buy
Exxon Mobil Corp	XOM	60,95	-0,5547	53,31	Buy
General Electric Co	GE	33,60	-0,5623	46,40	Sell
General Motors C...	GM	22,75	-0,7850	60,25	Buy
Hewlett-Packard Co	HPQ	32,07	-3,1410	41,51	Sell

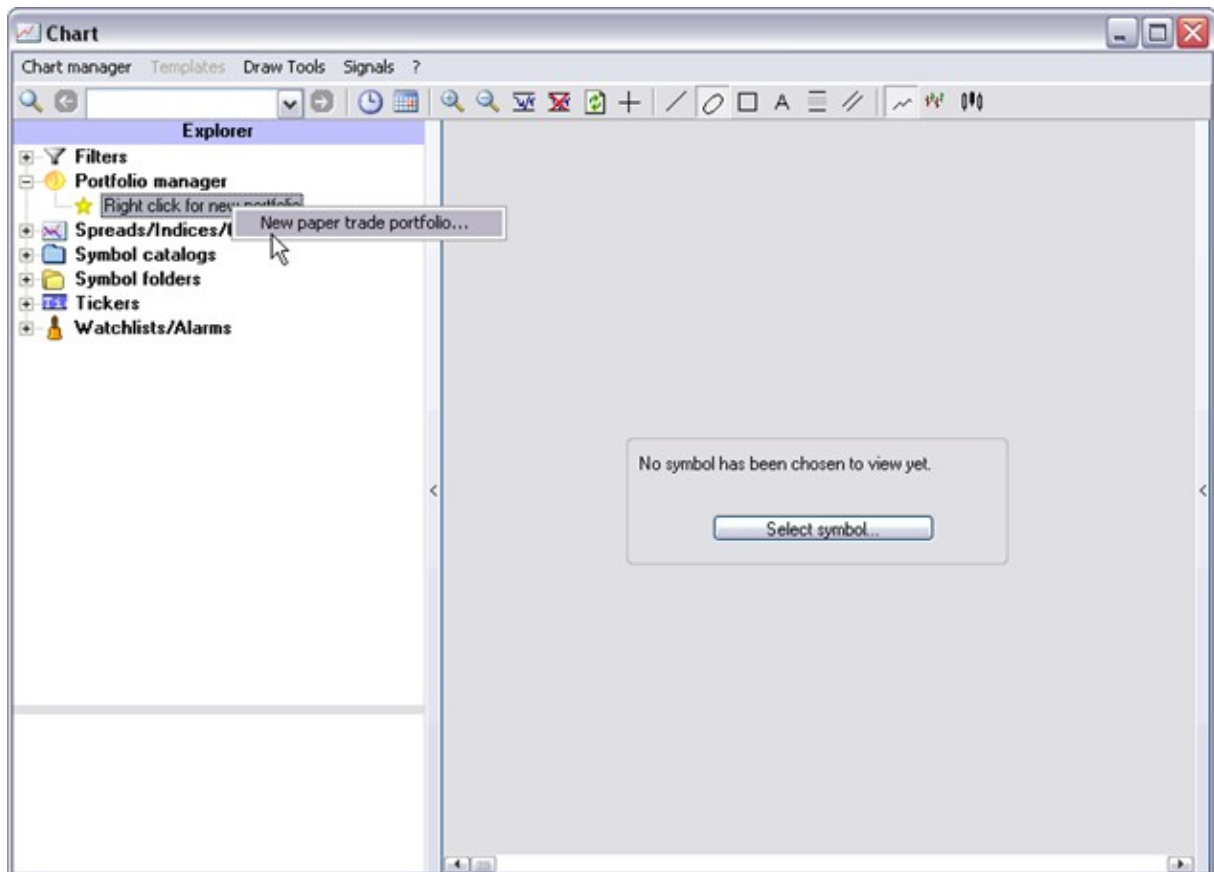
A new list column can be added by right clicking the head row. The selection of available columns appears.



Name	Local symbol	Close	Diff %
Alcoa Inc	AA	29,75	0,7791
Altria Group Inc.	MO	72,95	0,2749
American Expres...	AXP	52,85	-0,4708
American Internati...	AIG	66,95	-0,3127
Boeing Co	BA	76,54	0,8216
Caterpillar Inc	CAT	76,13	-0,1705
Citigroup Inc	C	47,75	-0,0419
Coca-Cola Co	KO	42,58	0,3537
El Du Pont De Ne...	DD	42,80	-0,3956
Exxon Mobil Corp	XOM	61,57	0,5224
General Electric Co	GE	33,97	-0,4396
General Motors C...	GM	21,98	-0,0909
Hewlett-Packard Co	HPQ	32,99	-0,0303

Create a portfolio

Fibotrader allows to handle virtual papertrade portfolios. Right click on 'Portfolio management' in the Explorers object tree and choose 'New papertrade portfolio...'. You can use an unlimited number of portfolios.



An input dialog opens, requiring to enter a name. Enter a name, optionally you can add other data like owner and bank. Finish by clicking **OK**.

Portfolio: Papertrade Portfolio

Transaction Tools ?

Current Transactions Results Graphics

Name	Δ Amount	Break-/Even	Price	Profit
adidas-Salomon	180,00	175,20	165,34	-1.775,00
SAP AG St.	85,00	171,79	174,00	187,45

Balance: 54.520,48 EUR Portfolio value: 98.930,68 EL Open P/L: -1.587,55 EUR Transact. (open): 6 (2)

The portfolio is now created and you can book transactions. An initial transaction has been made to have some money available in the virtual portfolio.

Portfolio management

Quickstart

A detailed view of the portfolio with different evaluations offers the portfolio manager. Right click a portfolio and choose 'Portfolio manager'.



Here you can find the possibility to book different transactions. The order is not relevant because entries are automatically sorted by date.

Transaction	Details	Direction	Date	Amount	Close
Close position	3M Co	Long	23.03.2006	193,00	77,18
Open position	adidas-Salomon	Long	23.03.2006	90,00	181,77
Open position	3M Co	Long	01.03.2006	193,00	74,07
Remittance order		n/a	23.02.2006	n/a	n/a
Open position	SAP AG St.	Long	06.12.2005	85,00	170,83
Open position	adidas-Salomon	Long	02.08.2005	90,00	166,41

Balance: 54.520,48 EUR Portfolio value: 98.930,68 EL Open P/L: -1.587,55 EUR Transact. (open): 6 (2)

Buying securities

There are different possibilities to buy securities. To buy and sell securities you need a portfolio. If you haven't created a portfolio yet, proceed with creating a portfolio.

- Right click on your portfolio in the FiboTrader Explorer

- Select **Portfolio manager**
- Click on **Transaction**, then **New**, and select Buy/sell stock
- Select the security and enter the amount you want to buy/sell
- Acknowledge with OK

Another way to buy a security is to select and drag & drop it into your portfolio. Or just right click on the security and select **Buy**.

Get current quotes

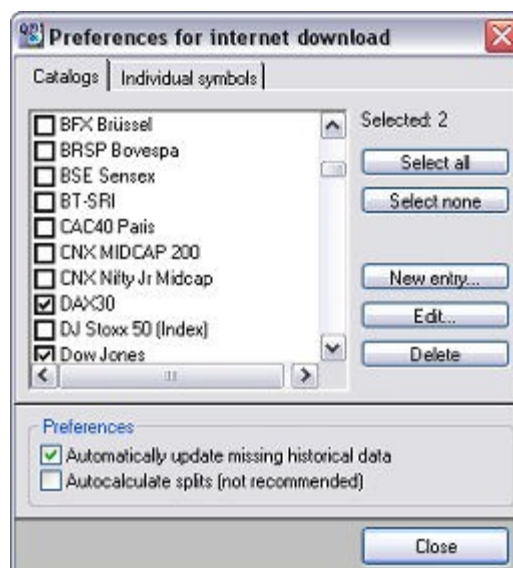
After the first start of QuoteMan you should start a data update. This can be done in Fibotrader by selecting Update data from the Data menu. The pre-selected data vendor is most often the free (delayed) internet service. You will be asked to select the catalogs to download.

After you chose these the download is started. You can open task manager from the 'Tools' Menu to watch the current state of the download. There are three progress bars in the QuoteMan main window. When the Intraday download is finished the missing historical data will be loaded. This process can be followed in the history assistant which can also be found in the 'Tools' menu.

The automatic download of Intraday data can be configured in the 'Data' menu by selecting 'Update automatically...' Here the interval can be chosen or deactivated.

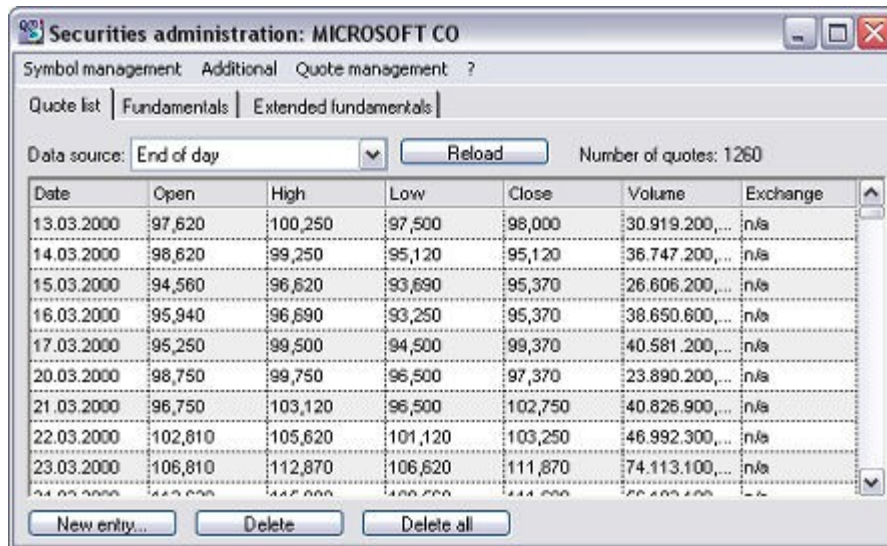


In QuoteMan select Program / Preferences / Internet download. A list of available indices opens which can be selected by setting the checkboxes. Select only the indices you're interested in. The next update will simply ignore the not selected data.



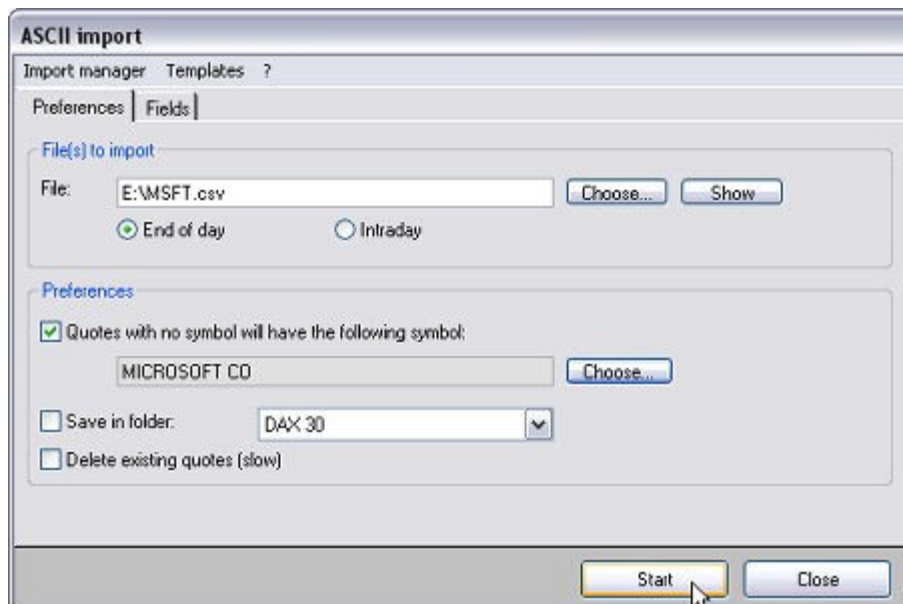
Securities administration

The securities administration can be found in the 'Tools' menu. Here you can change quotes manually, alter fundamental data, perform splits and much more.

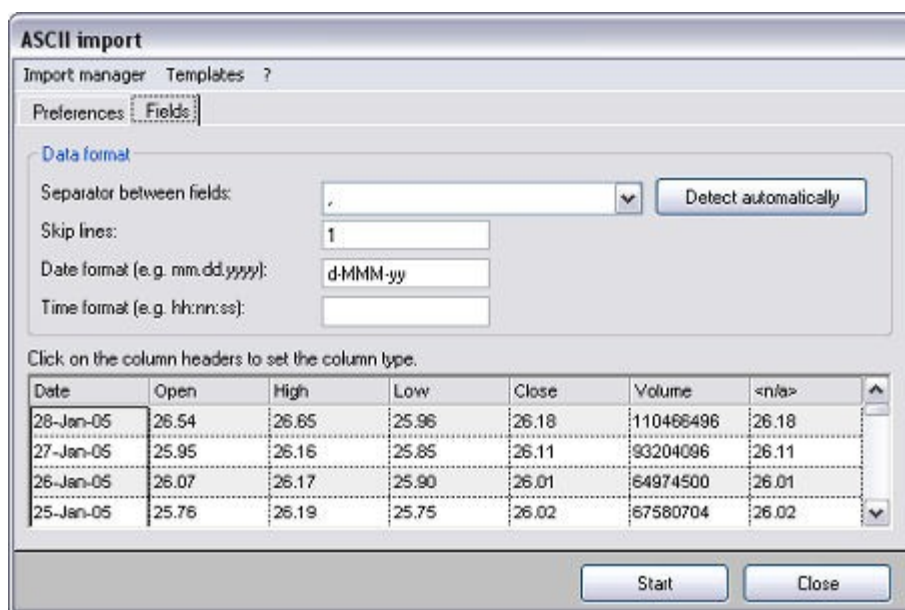


ASCII File Import

You can import price data easily from ASCII files with the import assistant of QuoteMan. This can be done in the menu Data / Import. Here select the file which contains the quotes and the target symbol. The data format is most often automatically recognized.

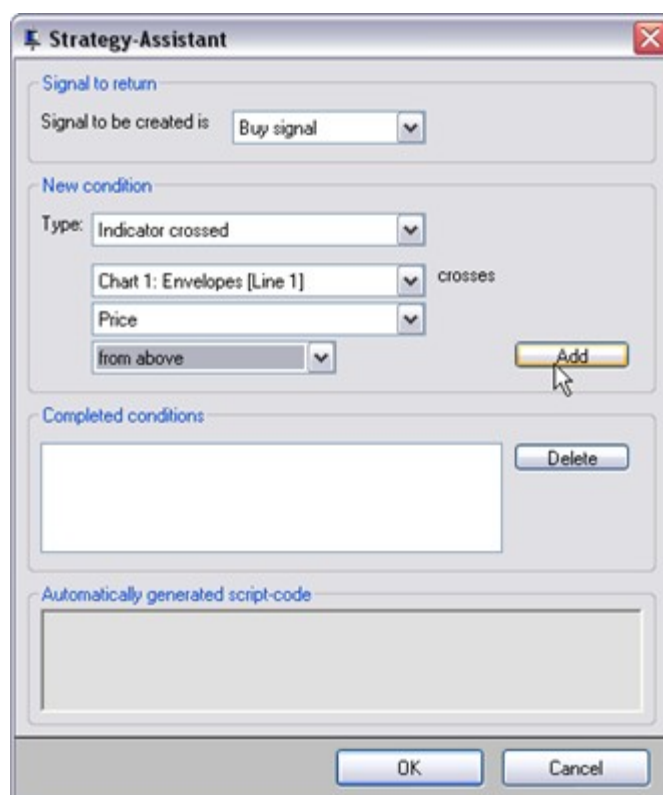


In most cases the recognition works flawless, beside that always check the result in the 'Fields' tab sheet to exclude mistakes.



Professionals: Creating signal conditions

You can combine multiple indicators to one signal condition. Buy, sell, cover and signal filter conditions can be created.

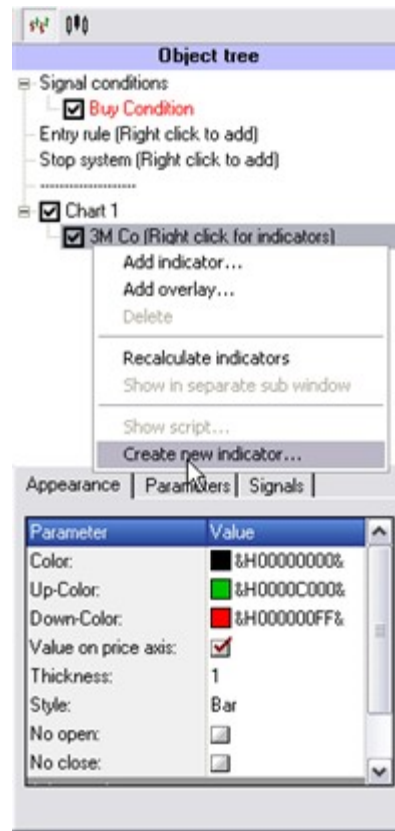


Create a new signal condition by right clicking at 'Signal conditions'. The Strategy assistant allows to define the desired combination of indicator values, signals and quote data. Afterwards the new condition can be edited in the tab sheet Parameters, based on the integrated script language.

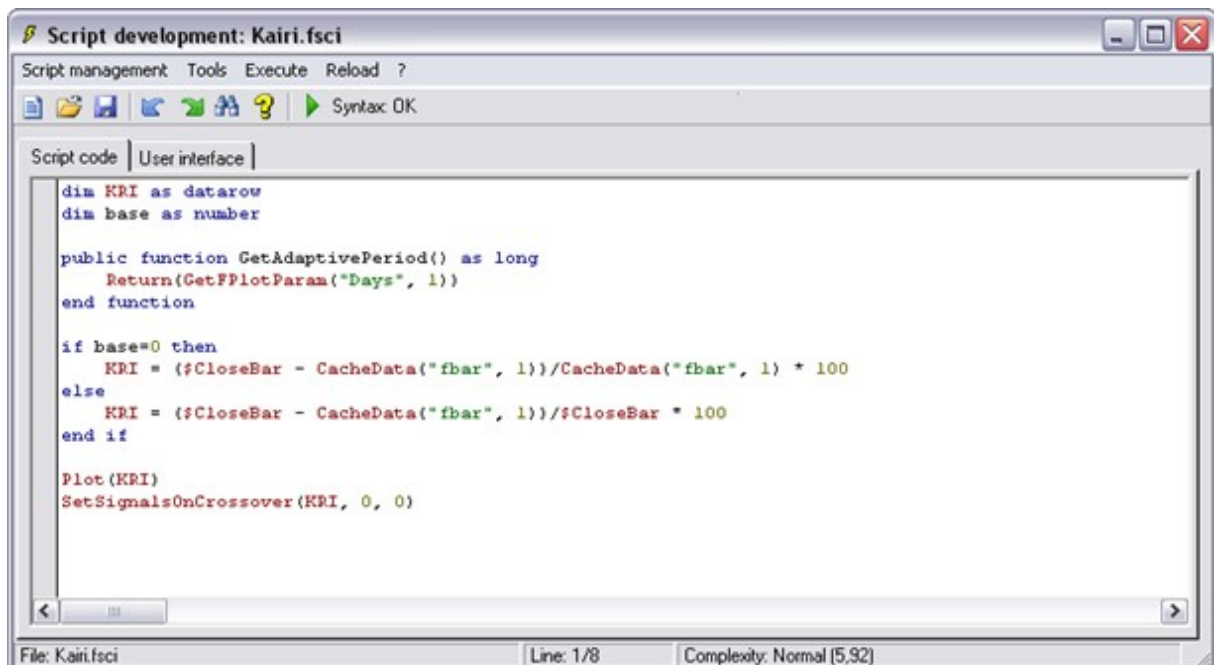
Professionals: Creating custom indicators

Quickstart

In Fibotrader you can create you own indicators by right-clicking the symbol in the object tree and choosing 'Create new indicator...'. This way you can first enter a name for this new indicator.



After confirmation of the dialog the script assistant opens. Here the new script code can be added.



By using the integrated script language you can use all implemented functions and add you own. The most indicators are available as source code and give a helping hand at first questions.