



Quick Reference Guide

Getting Started in a Visual Workspace Where You Can Excel

For more information on PANARAY®:

(800) 419-6632

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PANARAY.com

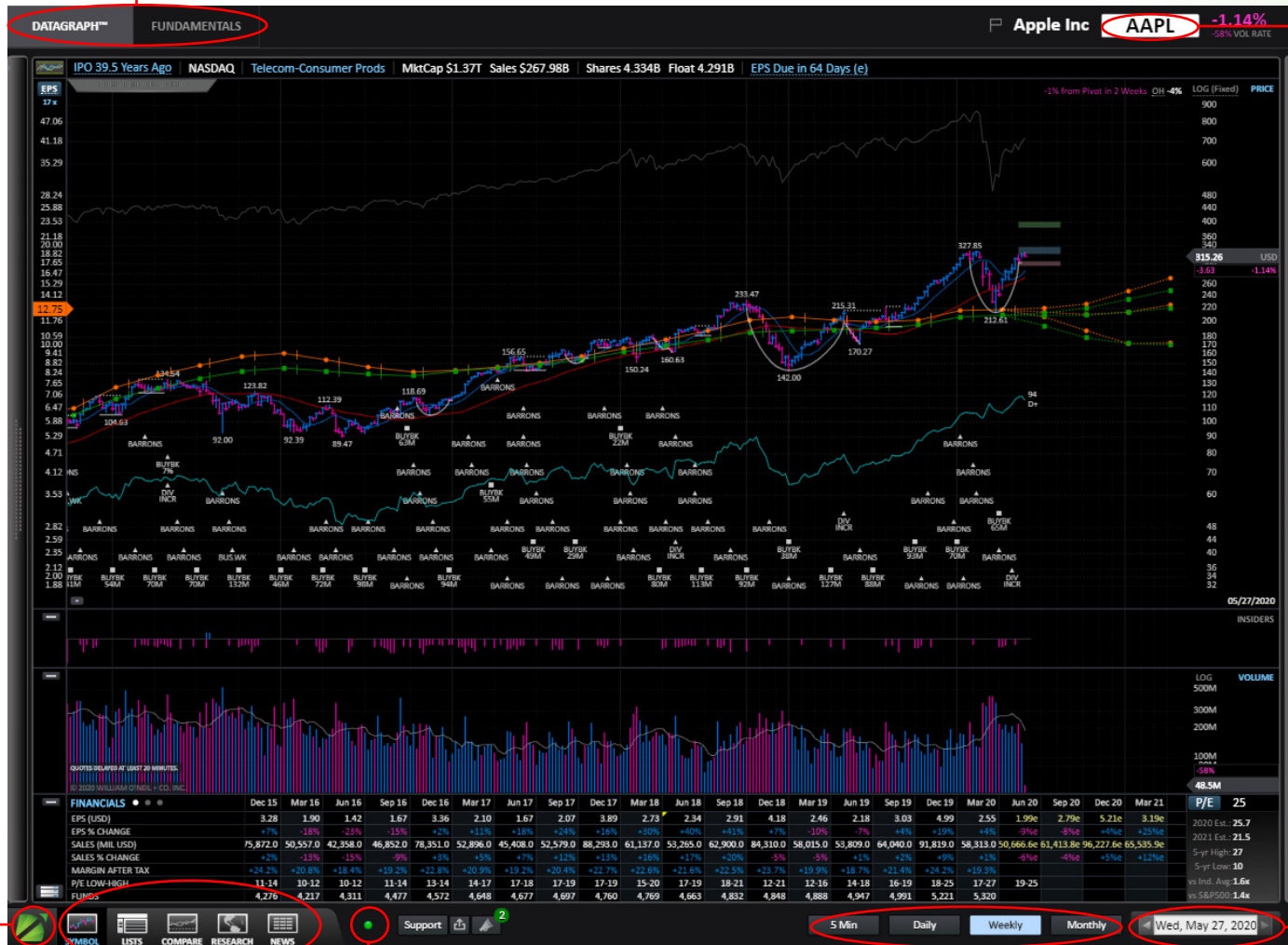
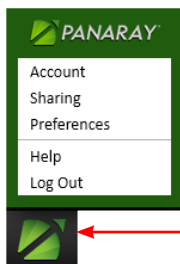
Getting Started

2 Datagraph™, Fundamentals Tabs
Use these tabs to toggle between the Datagraph and financial reports.

3 Symbol Input
Use this field to enter a symbol. Search for companies by typing the company name.

1 Application Menu
Use this menu to view/change account details, manage shared items, select preferences or get help

4 Change Date Controls
Change the chart end-date by typing in a specific date or by clicking in the field for a calendar. To move in time, click the date box arrows to scroll forward or backward.



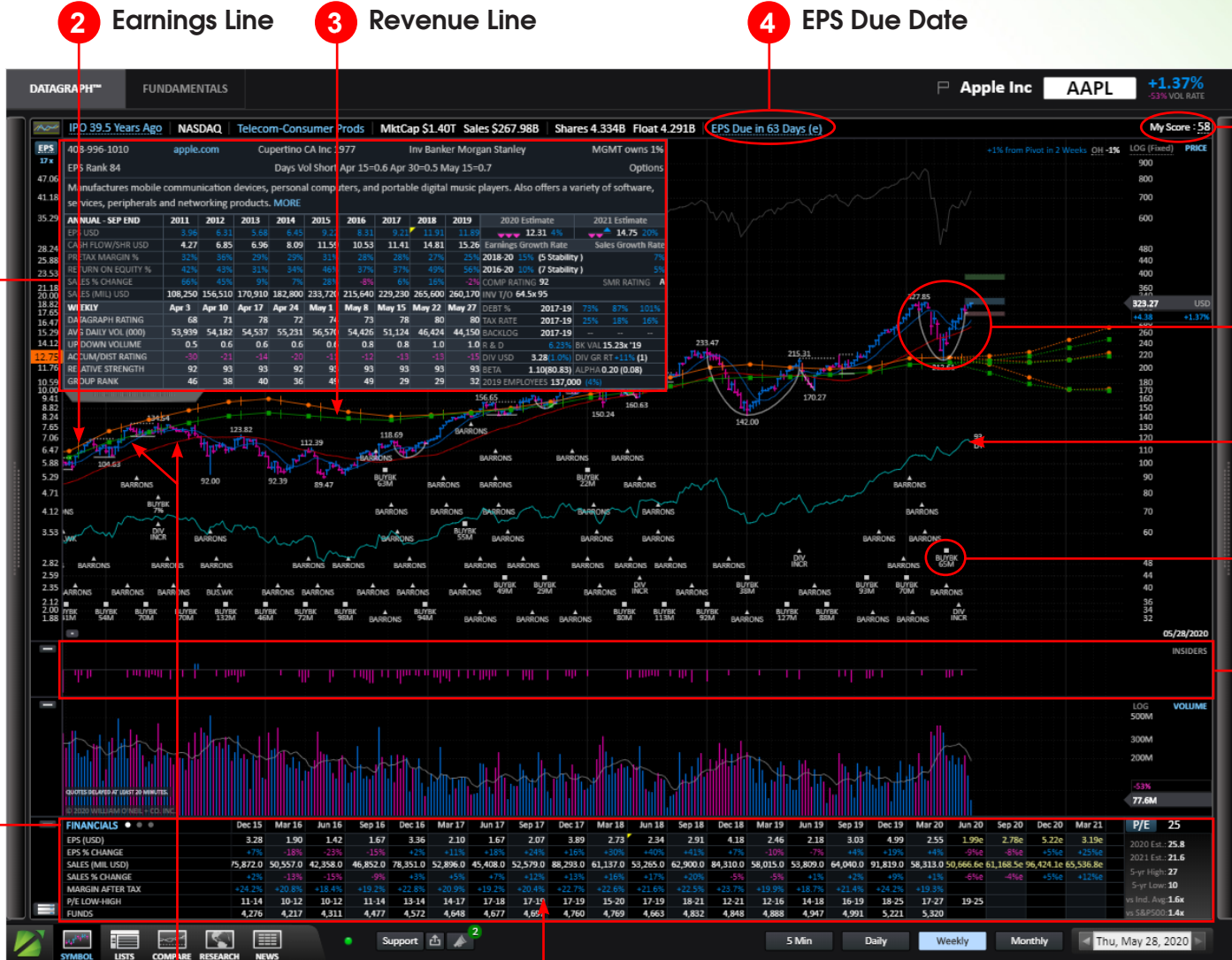
7 Global Navigation
These five icons represent the five main sections of PANARAY.

6 Quote Service Indicator
Turn on real-time pricing by setting your Quote Services in Preferences in Application Menu.

5 Chart Intervals
Customize each interval view by right-clicking to reveal a menu

Tip
Select Preferences in the Application menu referenced in #1 to choose between the dark and light color theme. View light theme on pages 3 & 8.

Types of Data



1 Summary Block
Click this tab to open and close summary information covering nine years of financial data, proprietary ratings and rankings, company description, and more.

12 Financial Block
Click the Financials label to reveal additional Financial block sizes and customization. Click the dots to the right to scroll through three pages of financial data.

Tip
Fundamental Data Lines can be temporarily repositioned up & down on the chart by clicking and dragging anywhere on the line.

Configuring Data

1 Indicator Panel
Select the indicators you want to see. You may view multiple indicators from the menu at once.

- Estimate Revisions
- Price-To-Earnings
- Price-To-Sales
- O'Neil Ratings
- Accumulation Distribution
- MACD
- RSI
- Stochastics
- My Score

11 Fundamental Data Line Scale
When multiple Fundamental Data Lines are visible, you can easily toggle among them.

2 Industry Group
View Industry Group chart, constituents or Rotation Graph (pg. 10).

3 Price and Volume Scale
Toggle among: Fixed Logarithmic (Log), Auto Logarithmic (Log), and Linear (Lin).

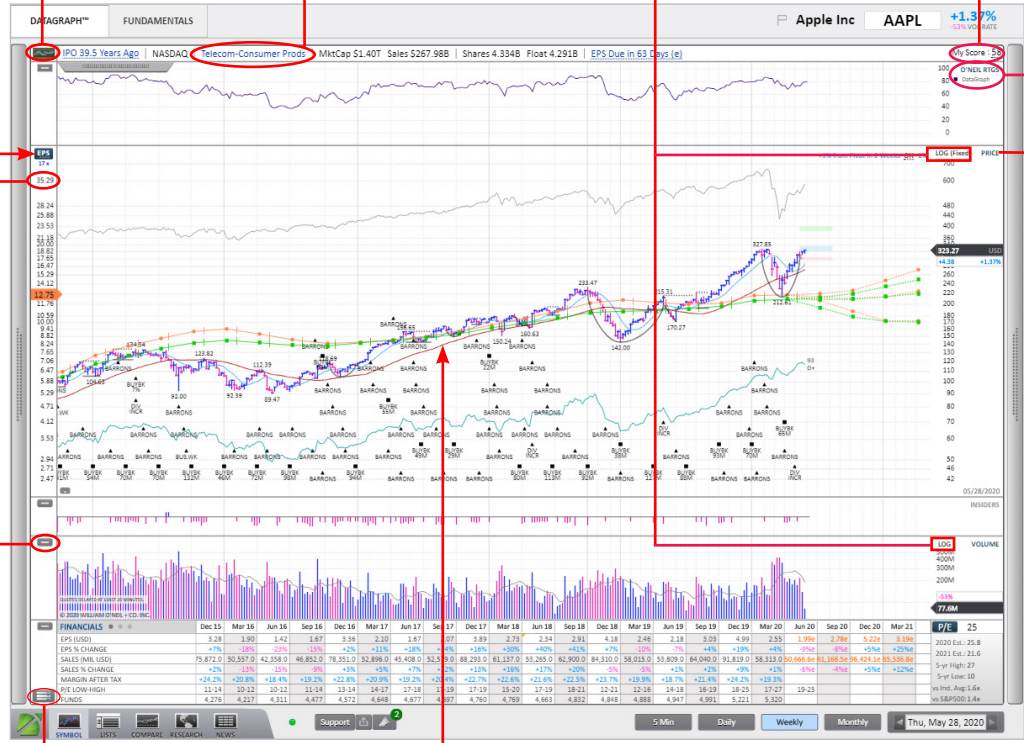
4 External Data Score
If you have multiple data items for a stock, click to toggle between items.

5 Indicator Properties
Customize each individual indicator by clicking on the indicator name and selecting Settings or Appearance.

10 Scale Configuration

9 Hide Panels
Click to hide panels

6 Price Panel Settings
Select from the menu to make items visible. Click edit to configure item properties.



8 Reveal Panels
Click to reveal Insider Transactions, Volume, and Financial Block. Click the Financials heading to configure individual items.

- Insider Transactions
- Volume
- Financial Block

7 Configure Moving Average Lines
Right-click directly on a moving average line to reveal options to edit or create a moving average alert. Add or edit other types of lines from the Price Panel Settings (see item #6).

- Index Line (OS&P5) [Edit](#)
- RS Line 1 (OS&P5) [Edit](#)
- RS Line 2 (G4894) [Edit](#)
- Fundamental Data Lines
- Pattern Recognition [Edit](#)
- Corporate Events [Edit](#)
- High/Low Prices
- % Chg (High->Low, Low->High)
- External Data
- 10 SMA [Edit](#) | [Delete](#)
- 40 SMA [Edit](#) | [Delete](#)
- Add a Moving Average

INDEX LINE

Set index line value per country.

Region: North America Country: United States

Value: Country's Default: OS&P5

Symbol's Group Industry Group (197) Symbol

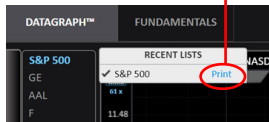
Choose line display settings.

Color: Weight:

Tip
Labels that are blue are clickable and will reveal menus.

Batch Printing

Click the name of the list to print the charts for all stocks listed in the panel.



5

Apple Inc AAPL +1.37%

My Score: 58

TELECOM-CONSUMER PRODS | MktCap \$1.40T | Sales \$267.98B | Shares 4.334B | Float 4.291B | EPS Due in 63 Days (e)

Price: \$227.27 | Change: +4.38 (+1.37%)

Checklist Score: Stable Earnings Growers: 83% (5 OF 6 PASSED | 0 N/A)

EPS Growth Rt %: 10%

EPS Growth Rt, 5 Yr: 7

EPS Rnk Wkly, Cur: 84

RS, Wkly, Cur Wk: 93

Mkt Val, USD (Mil): 1,396,264

Vol, Avg Dly Vol Ls: 44,150

	7 Jun 17	Sep 17	Dec 17	Mar 18	Jun 18	Sep 18	Dec 18	Mar 19	Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21	P/E
EPS (USD)	1.67	2.07	3.89	2.73	2.34	2.91	4.18	2.46	2.18	3.03	4.99	2.55	1.99e	2.79e	5.22e	3.19e	25
EPS % CHANGE	+18%	+26%	+12%	+60%	+45%	+63%	-7%	-30%	-7%	+5%	+13%	+4%	-2%	-8%	+2%	+23%	
SALES (MIL USD)	45,408.0	52,579.0	88,238.0	61,137.0	53,265.0	62,900.0	84,310.0	58,015.0	53,809.0	64,040.0	91,819.0	58,313.0	50,866.6e	61,188.5e	96,424.3e	65,536.8e	
SALES % CHANGE	+7%	+12%	+13%	+16%	+17%	+20%	-5%	-5%	+1%	+2%	+9%	+1%	-1e	+1e	+12e		
MARGIN AFTER TAX	+13.2%	+21.4%	+22.7%	+22.6%	+22.6%	+22.5%	+23.7%	+13.9%	+13.7%	+21.4%	+24.7%	+13.3%					
P/E LOW-HIGH	7	17-18	17-19	15-20	17-19	19-21	19-21	13-16	14-18	16-19	19-25	17-27	19-25				
FLUIDS	4,677	4,697	4,760	4,663	4,832	4,848	4,888	4,947	4,991	5,221	5,320						

1 Related Information

This panel contains news, ownership information, stock checklists, external data and tools for setting alerts.

2 News

RELATED INFORMATION

ALERTS CHECKLIST IDEA LIST

NEWS EXTERNAL OWNERSHIP

Back O'NEIL SCREENS

RS Line High near 2 Yr High

Stable Earnings Growers

Strong Dividend Yield

Strong Return on Equity

Top Rated Stocks (Modified)

Checklist Score: Stable Earnings Growers: 83% (5 OF 6 PASSED | 0 N/A)

EPS Growth Rt %: 10%

EPS Growth Rt, 5 Yr: 7

EPS Rnk Wkly, Cur: 84

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Mkt Val, USD (Mil): 1,396,264

Vol, Avg Dly Vol Ls: 44,150

INSIDERS

VOLUME

77.6M

05/28/2020

Daily Crunch: Twitter vs. Trump

6 hrs ago - Yahoo! Finance

A recession is a great time to start a new business

7 hrs ago - Yahoo! Finance

How to possibly make easy money from Trump's battle with Twitter and...

7 hrs ago - Yahoo! Finance

Dow Jones Slashes Nearly 200-Point Gain Amid China News; Facebook...

7 hrs ago - Yahoo! Finance

Workday (WDAY) Q1 Earnings Miss Estimates, Revenues Beat

8 hrs ago - Yahoo! Finance

Monthly Thu, May 28, 2020

4 Mini List

Click the left black strip to reveal the list that is active in List Manager (pg 6). Use the space bar to move quickly through the list of symbols.

PRICE ALERT

Price USD

Note

[Notification Preferences](#)

1 Price Alerts
Right-click on the chart or click the bell icon to set a price alert.

2 Moving Average Alert
Right-click the moving average line to set an alert.

3 Active Alert
A grey bell indicates an active price alert.

4 And-condition Alerts and Or-condition Alerts
Set alerts based on various criteria including price and volume, pattern recognition and more. And-condition alerts allow you to set an alert based on 2 conditions occurring at the same time and Or-conditions alerts will be triggered when any of the selected criteria are met.

- Price Alert
- And-condition Alerts
- Or-condition Alerts

6 Message Notification
Click to access Message Center to view triggered alerts & other messages. Icon will indicate unseen messages.

5 Triggered Alert
An orange bell indicates a recently triggered price alert.

Tip
View a list of active alerts under Smart Lists in List Manager.

Select Up To 2 Alert Criteria

Alert me when ALL of the following conditions are met:

PRICE AND VOLUME

- Price USD
- Daily price change exceeds +/- 5 %
- Daily volume rate exceeds 100 %
 - Delay:minutes from 0 start of trading day
- Average daily volume crosses 1000 (000) shares
- Average daily \$ volume, USD crosses \$ 500 (000)
- Daily volume exceeds 50 SMA
- Daily price rate exceeds 50 SMA

Or-condition Alerts

Alert me when any symbol on meets any of the following conditions:

PATTERN RECOGNITION

BASE	Daily	Weekly
New base detected	<input type="checkbox"/>	<input type="checkbox"/>
Tight area detected	<input type="checkbox"/>	<input type="checkbox"/>
Failed breakout detected	<input type="checkbox"/>	<input type="checkbox"/>
PIVOT		
Price rises to within 5 % of pivot	<input type="checkbox"/>	<input type="checkbox"/>

[Alert Preferences](#)

List Manager

Tip
Drag and drop any list into a list in the My Lists folder to merge stock names.

1 Screen On/Off
Toggle screen on and off.

4 Custom Calcs
Create customized calculations for screening.

5 Keyword Filters
Filter a list by entering any keyword contained in the company's name or description.

6 List Manager Options

3 Column Filters
Click a cell to apply a filter.

13 Databases
Our deep, clean database tracks 70,000 stocks, indices, and mutual funds in more than 72 countries. The External Database allows you to upload your own data into Panaray and plot it on the Datagraph

12 List Names
Organize custom lists and access preset PANARAY lists here.

11 Flags
Flag symbols here or next to company name on the Datagraph.

10 Edit Lists
Create, copy, or delete lists.

The screenshot shows the List Manager interface with the following elements:

- Top Bar:** "342 out of 505 items in S&P 500", "Column Set: Recommended", "Add Columns", and "Keyword Filter" (with a search input).
- Left Panel:** "DATABASE" (with sub-tabs: FAVORITES, PORTFOLIOS, MY LISTS, GLOBAL FOCUS COLLECTION, PANARAY LISTS, SMART LISTS, SHARED LISTS). The "S&P 500" list is selected.
- Main Table:** A table with columns: #, Symbol, Name, Type, EPS + DG + RS (with a filter of ≥ 50), Cur Price, Price, Intraday Price Chg, Price, % Chg, Vol, Avg Dly Local..., Mkt Val (Mil), EPS Rnk Wkly, Cur Wk, RS, Wkly, Cur Wk, SMR Ltr Rte, Cur Wk, DG Rnk, Cur Wk.
- Bottom Panel:** "Summary Stats" table, "Cur Price" chart, and navigation icons (SYMBOL, LISTS, COMPARE, RESEARCH, NEWS, Support).

7 Sort
Click to sort, click again to reverse-sort, hold control key and click any number of columns to multi-sort. To disable multi-sort, click any column.

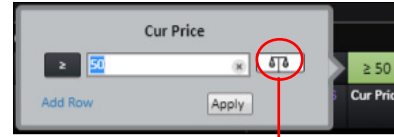
9 List Alerts

8 List Properties
Saved list information includes dates for list creation and updates. Preset list information includes details on parameters.

Tip
Right-click in symbol row to copy and paste stocks into saved lists.

List Metrics

2 Metric vs. Metric Screening



3 Column Sets

Select a Column set from the drop down window to change your report (includes filters).

1 Universal Filter

Filters all lists (except temporary constituents lists) by geography or group (Sector, Industry Group, etc).

8 Metric Library

Select "Add Columns" (#4) to launch. Browse or type in search to locate a metric and then add any column

Click to Add Metric

Composite Rating

Interval: Weekly | Lookback: Most Recent

Description

Combines EPS Rank, Relative Industry Group Relative Str Rating, Accumulation Distribution, stock's percent off its 52-week high. More weight is placed on Earnings Results are then compared to same country, and each country rating from 1-99 with 99 being the best. Means that the stock has outperformed 90% of stocks in the same country in terms of its combined ratings. Shorthand = [COMP [DISIT]].

Lookback options: 1 week ago, 2 weeks ago, 3 weeks ago, 4 weeks ago, 8 weeks ago, 13 weeks ago, 26 weeks ago

7 Look Back

Historical values are available for many metrics.

6

Distribution Chart

To see the distribution for the corresponding metric, hover your cursor on a bar to reveal specific range information.

5

Summary Statistics

Look here for key list statistics on each metric in the report.

4 Add Columns

Browse the Metric Library (see #8) for new columns to add to your report.

342 out of 505 items in S&P 500

Column Set: Recommended

Screen (1) ON

Search: []

Select a Metric Root: 731

My Metrics: Custom Metrics (1), Alert Matrix (39), Earnings Per Share (8), EPS (55), EPS Estimate (8), EPS Growth Rate (8), Financial Ratios (12), Activity (14), Debt and Liquidity (9), Margins (20), Profitability (9), Financial Statements (5), Balance Sheet (10), Cash Flow (9), Income Statement (58), General (5), Company (4), Index Membership (21), Groups (3), GICS Industries (6), O'Neil Industries (24), Rotation Graph (4), Liquidity (1), Market Value (2), Shares (24), O'Neil Lists (4), Global Focus Collection (1), O'Neil Ratings & Rankings (2), Accumulation/Distribution (1), Composite Rating (4), Datagraph Rating (2), EPS Rank (4), Industry (13)

#	Symbol	Name	Type	EPS + DG + RS (5W)	Cur Price	Price, Intraday Price Chg	Price, % Chg	Vol, Avg Dly Local...	Mkt Val (Mil)	EPS Rnk Wkly, Cur Wk	RS, Wkly, Cur Wk	SMR Ltr Rtg, Cur Wk	DG Cu
486	PAYC	Paycom Software Inc	S	262	308.15	10.92	3.7%	321,633	18,047	97	86	A	
291	VRTX	Vertex Pharmaceuticals	S	287	286.48	-1.48	-0.5%	647,104	74,277	99	94	A	
28	BMJ	Bristol-Myers Squibb Co	S	268	60.47	0.75	1.2%	1,002,639	136,813	98	84	A	
256	ADBE	Adobe Inc	S	278	389.01	2.41	0.6%	1,389,131	187,425	99	90	A	
443	MA	Mastercard Inc Cl A	S	250	301.92	1.03	0.3%	1,920,039	299,819	94	79	A	
203	KLAC	K L A Corp	S	274	177.67	1.71	1.0%	284,404	27,854	96	90	A	
106	SPGI	S&P Global Inc	S	273	328.06	3.04	0.9%	601,937	79,030	97	91	A	
431	MKTX	Marketaxess Holdings Inc	S	269	520.21	11.62	2.3%	168,394	19,721	95	95	A	
351	ALXN	Alexion Pharmaceuticals	S	264	117.83	-2.07	-1.7%	301,920	26,020	96	87	A	
113	MRK	Merck & Co	S	221	79.53	-1.19	-1.5%	978,996	200,742	89	68	A	
454	MSCI	M S C I Inc	S	272	334.75	5.90	1.8%	229,767	27,983	98	91	A	
455	V	Visa Inc Cl A	S	255	194.58	-0.66	-0.3%	2,481,500	328,278	94	82	A	
75	LHX	L3Harris Technologies	S	231	197.09	-2.37	-1.2%	318,980	43,568	95	68	A	
461	FTNT	Fortinet Inc	S	286	144.58	5.38	3.9%	315,664	23,308	99	96	A	
250	MSFT	Microsoft Corp	S	274	182.83	-0.43	-0.2%	8,592,446	1,386,442	97	90	A	
287	REGN	Regeneron Pharmaceutical	S	290	606.73	-6.08	-1.0%	958,557	65,630	97	97	A	
45	MCO	Moodys Corporation	S	271	276.42	9.01	3.4%	308,859	51,829	96	89	A	
472	NOW	ServiceNow Inc	S	279	385.84	-2.09	-0.5%	967,730	73,581	97	93	A	
258	FISV	Fiserv Inc	S	229	108.54	1.77	1.7%	532,419	72,666	89	73	A	
470	FB	Facebook Inc Cl A	S	276	229.44	4.35	1.9%	5,927,070	551,700	96	88	A	
379	NVDA	Nvidia Corp	S	283	351.96	-3.07	-0.9%	5,472,633	215,396	99	97	A	
396	EW	Edwards Lifesciences	S	259	74.27	-0.64	-0.8%	312,294	15,341	97	81	A	

Summary Stats

	Count	Count (Not Blank)	Average	Std. Dev	Mode	Maximum	90th %	75th %	50th % (Median)
Count	342	342	342	342	342	342	342	342	342
Count (Not Blank)	342	342	342	342	342	342	342	342	327
Average	211	184.89	1.44	0.8%	580,671	65,650	77	68	B
Std. Dev	47	277.21	5.01	1.5%	1,289,273	140,803	18	23	
Mode	235	53.14	-0.22	0.8%	93,689	3,754	85	86	B
Maximum	290	3,258.03	51.74	7.5%	13,501,608	1,395,873	99	98	A
90th %	264	317.45	3.69	2.7%	1,004,604	134,511	95	91	A
75th %	250	194.52	1.83	1.5%	526,211	62,667	90	86	A
50th % (Median)	220	116.37	0.88	0.8%	279,165	26,380	81	77	B

Cur Price Distribution Chart

Scheduled Lists

Name Your List
Give your Scheduled List a Nickname

Screen/Filter Your List
Screen and/or Filter the Scheduled List to meet your criteria

Choose a Delivery Method
Select how to receive your Scheduled List: via email (embedded or as an attachment), by creating a new list in List Manager, or both.

The dialog box 'SCHEDULED LISTS' contains the following fields and options:

- 1. Nickname (Optional): Text input field.
- 2. Universe: Dropdown menu showing 'S&P 500'.
- 3. Column Set (screen): Dropdown menu showing 'No Column Set'.
- 4. Frequency: Dropdown menu showing 'Weekly - Friday'.
- 4. Time: Text input field showing '08:30 PM'.
- 5. Send results via email: Radio buttons for 'Embed in email', 'Excel Attachment', and 'Create new list with results'.

2 Choose a Stock Universe
Choose the universe for the Scheduled List from all lists in List Manager

4 Set Up a Schedule
Set up how often and at what time the Scheduled List runs

6 Create a List
Create new Scheduled Lists

7 Access Your Lists
Access Scheduled Lists from List Manager Options

Tip
With scheduled emails, PANARAY alerts you of stocks that have been added or removed from your lists based on your criteria. Never miss that stock that just hit all your criteria or be surprised when ratings and rankings deteriorate.

The main interface shows a table of 262 items in the 'Holding' portfolio. The table columns include #, Symbol, Name, Type, HQ Country, Exch, Primary, Cur Price, Price, Intraday Price Chg, and Date Added. A 'SCHEDULED LISTS' dialog box is open, showing 'Create New Scheduled List' with options for 'S&P 100 + Low EV/EBITDA, High Growth' and 'S&P 500 Screen'.

#	Symbol	Name	Type	HQ Country	Exch	Primary	Cur Price	Price	Intraday Price Chg	Date Added
171	101.KW	National Bank Of Kuwait	S	Kuwait	KUWAIF...		0.80	0.00		1/27/2020 12:29 PM
158	ACC.TW	Accton Technology	S	Taiwan	TAIWAN		223.50	6.00		1/27/2020 12:28 PM
165	ACT.CN	Accelink Techs.'A'								1/27/2020 12:28 PM
179	ADBE	Adobe Inc								1/27/2020 12:29 PM
180	ADUS	Addus Homecare Corp								1/27/2020 12:29 PM
164	ADV.TW	Advantech								1/27/2020 12:28 PM
1	ADYE.NL	Adyen								1/27/2020 12:28 PM
140	AEH.CN	Aler Eye Hospital Gp.'A'								1/27/2020 12:28 PM
2	AFX.DE	Carl Zeiss Meditec (Xet)								1/27/2020 12:28 PM
155	AIH.TW	Ase Technology Holding								1/27/2020 12:28 PM
3	AIRS.FR	Airbus								1/27/2020 12:28 PM
181	ALG	Alamo Group Inc								1/27/2020 12:29 PM
4	ALLAU	Aristocrat Leisure								1/27/2020 12:28 PM
5	ALU.AU	Altium								1/27/2020 12:28 PM
182	AMAT	Applied Materials Inc								1/27/2020 12:29 PM
183	AMD	Advanced Micro Devices								1/27/2020 12:29 PM
184	AMT	American Tower Corp								1/27/2020 12:29 PM
6	ANH.HK	Anhui Conch Cement 'H'								1/27/2020 12:28 PM
185	AON	Aon Plc								1/27/2020 12:29 PM
95	APLIN	Asian Paints								1/27/2020 12:28 PM
7	APTAU	Afterpay								1/27/2020 12:28 PM
102	ARK.IN	Astral Poly Technik	S	India	NATION...		8783.10	-20.20		1/27/2020 12:28 PM
143	AS.IN	Avenue Supermarts	S	India	NATION...		2,406.50	18.15		1/27/2020 12:28 PM
8	ASML.NL	Asml Holding	S	Netherlands	AMSTER...		300.40	-7.60		1/27/2020 12:28 PM
186	AVGO	Broadcom Inc	S	United Sta...	NASDAQ		293.75	-21.29		1/27/2020 12:29 PM
187	AVLR	Avalara Inc	S	United Sta...	NYSE		99.65	-2.62		1/27/2020 12:29 PM
9	AVV.GB	Aveva Group	S	United Kin...	LONDON		3,922.00	-165.00		1/27/2020 12:28 PM
167	AZL.BR	Azul Pn	S	Brazil	SAO PA...		23.50	-2.28		1/27/2020 12:28 PM
188	BABA	Alibaba Group Hldg Ads	S	Hong Kong	NYSE		215.24	-8.44		1/27/2020 12:29 PM
121	BCA.ID	Bank Central Asia	S	Indonesia	Indonesi...		28,400...	-600.00		1/27/2020 12:28 PM
189	BCO	Brinks Co	S	United Sta...	NYSE		45.96	-3.86		1/27/2020 12:29 PM

8 Manage Your Lists
Manage existing Scheduled Lists

List Alerts

1

Conditional Alerts

Right-click on any list under "My Lists" to set alerts for all stocks within the list

The screenshot shows a software interface with a table of stock data. A context menu is open over the 'My Lists' section, with 'Add conditional Alerts' highlighted. The table below shows columns for various stock metrics and a summary table.

#	Symbol	Name	Type	Exch. Primary	Cur Price	Price Intraday	Date Added	Price % Chg	Vol Rate Intraday	Vol. Avg Chg Local	Mkt Vol (M)	Trading Currency	EPS Trd Wkly Cur	RS Wkly Cur Wk	ATR 14tr Day	SMR 10r Day	OC Rtg. Cur Wk	Composite Rating	Gap Rtg. Cur Wk	Ind Grp Name	Business Summary	Symbol-Local	Symbol-Bloomberg	Symbol-Bloomberg
3	AMZN	Amazon.com Inc	5	NASDAQ	3,138.29	0.00	7/22/20...	0.0%	-100%	14,216.1...	1,565,304	USD	82	92	B+	B	76	97	4	Retail...	Provid...	AMZN	AMZN-O	AMZN...
2	FB	Facebook Inc C1A	5	NASDAQ	241.75	0.00	7/22/20...	0.0%	100%	6,212.902	581,300	USD	96	84	A-	A	92	99	7	Interne...	Provid...	FB	FB-O	FB US
	VRTX	Vertex Pharmaceuticals	5	NASDAQ	291.40	0.00	7/22/20...	0.0%	-100%	519.275	75,553	USD	99	86	B-	A	87	99	15	Medic...	Develo...	VRTX	VRTX-O	VRTX US

2

And-condition Alerts Settings

Set an alert based on 2 conditions occurring at the same time.

The dialog box is titled 'Select Up To 2 Alert Criteria'. Under 'And-condition Alerts', it says 'Alert me when any symbol on Holding meets ALL of the following conditions:'. The 'PRICE AND VOLUME' section has the following options:

- Daily price change exceeds +/- 5 %
- Daily volume rate exceeds 100 %
- Delay: minutes from 0 start of trading day
- Average daily volume crosses 1000 (000) shares
- Average daily \$ volume, USD crosses \$ 500 (000)
- Daily volume exceeds 50 SMA
- Breaking out to all-time high
- Relative Strength Line reaches new 52-week high (based on)

3

Or-condition Alerts Settings

Or-conditions alerts will be triggered when any of the selected criteria are met.

The dialog box is titled 'List Alerts'. Under 'Or-condition Alerts', it says 'Alert me when any symbol on Holding meets any of the following conditions:'. The 'PRICE AND VOLUME' section has the following options:

- Daily price change exceeds +/- 5 %
- Daily volume rate exceeds 100 %
- Delay: minutes from 0 start of trading day
- Average daily volume crosses 1000 (000) shares
- Average daily \$ volume, USD crosses \$ 500 (000)
- Daily volume exceeds 50 SMA
- Breaking out to all-time high

At the bottom, there are buttons for 'Column Set' (No Column Set) and 'Geography' (All), and a red box highlights the 'Alert Preferences' button.

4

Notification Preferences

Click on "Alert Preferences" to add your email address or phone number to receive alerts via email or text message.

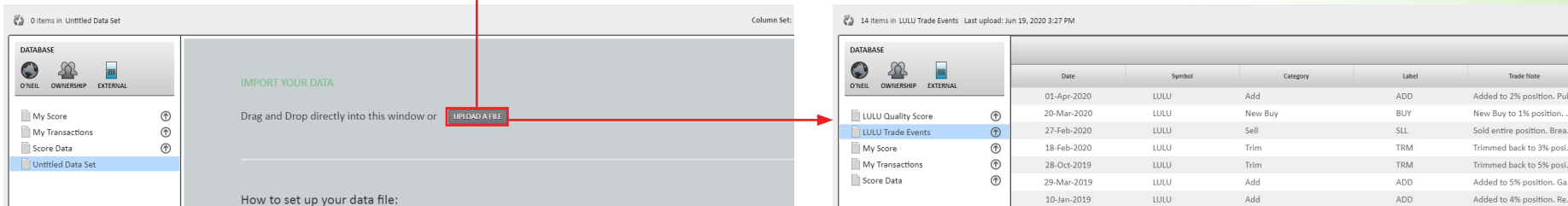
The dialog box contains the following settings:

- Communication email: [Add Email Address](#)
- Alerts: ON OFF
- Scheduled Lists: ON OFF
- SMS phone number: [Add Mobile Number](#)
- Alerts: ON OFF
- Notification Window: ON OFF
- Play Sounds: ON OFF
- Alert Icons: VISIBLE HIDDEN
- Daily Emails/SMS Limit: 250

Tip

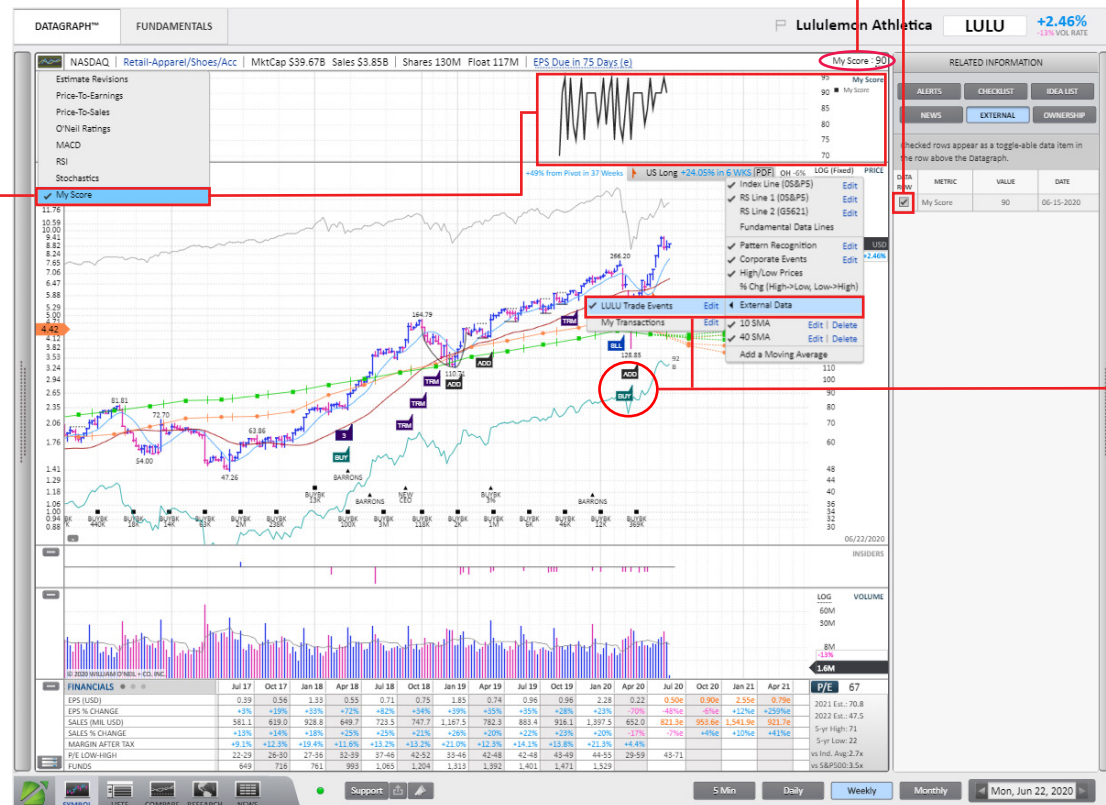
Setting alerts over a list means you will be notified when any of the stocks in the list meet the criteria

1 Create External Data List
 Import your Data into PANARAY List Manager by easily creating a new List and select 'Upload A File' or Drag and Drop. Upload Numerical ratings in a time series or date-based events.



2 External Data Score
 Numerical ratings can be toggled on or off in the Related Information panel.

4 External Data Indicator
 View a line graph of your data in the Symbol Tab.



3 Event Flags
 Event based data, accessible via the price panel, appear as flags on the chart.

Groups Rotation Graphic

Tip
Right-click Group Movement Indicators (#7) to view Symbol in Datagraph



1 Geography Selector
Click to select among Global, Region, and Country views.

United States

SYMBOL	NAME
RTL	Retail
CYC	Consumer Cyclical
MAT	Global
TECH	Technology
HLTH	Health Care
UTL	Utility
STPL	Consumer Staple
CAP	Capital Equipment
TRAN	Transportation
ENRG	Energy
MAT	Basic Material

2 Legend Row
Select to add/remove highlight.

3 Arrow
Select to drill down to constituents.

4 Flag

Select to flag a symbol and monitor it in other views.

COUP Coupa Software Inc
DOCU DocuSign Inc
GDDY Godaddy Inc Cl A

LIQUIDITY FILTERS

Market Capitalization (in millions) US\$
30 - 1,753,031

Average Daily Dollar Volume (in millions) US\$
110 - 40,478

RATING FILTERS

Global Datagraph Rating
70 - 99

Global EPS Rank
71 - 99

LIQUIDITY & RATINGS FILTERS

5 Liquidity & Ratings Filters
Select to adjust for market cap, avg dollar volume US\$, or O'Neil Ratings when viewing constituents.

7 Group Movement Indicators

Select the individual indicators to highlight. Select again to un-highlight.

6 Animate Rotation Graph

To animate the Rotation Graph over time, drag-hold and move, or hit Play.

Comparison Charts

1 Base Scale
Toggle between 0 or 100.

Performance Scale **3**

2 Symbol Input
Use this field to enter a symbol. Search for companies by typing the company name.



4 Legend Row
Select to hide or show lines. Select name to add/remove highlight.

5 Index Line
Click to create a price weighted index line from the current symbols.

8 Chart Intervals
Change maximum chart history length.

7 Change Date Controls
Change the chart start and end-date by typing in a specific date within the limit of the chart interval, or click to open a calendar menu.

6 Liquidity Filter
Select to adjust for market cap, avg dollar volume US\$, or O'Neil Ratings.

Research View

1 Global Outlook
Visually monitor the pulse of world markets.

2 Ask An Analyst
Contact our analyst team with questions about the markets or our services.

Tip
Stay up-to-date on all the research commentary our global analysts are publishing.

The screenshot shows the O'NEIL RESEARCH dashboard. At the top left is the 'DASHBOARD' tab and the 'O'NEIL RESEARCH' logo. A search bar is located next to a button labeled 'Ask an Analyst', which is circled in red. Below the search bar is a row of buttons for various stock markets: WIZZ.GB, IMCD.NL, AIRS.FR, VAS.AT, EDF.FR, RENU.FR, MIDL.FR, EXSA.DE, and LHAX.DE.

The main content area is divided into several sections:

- GLOBAL OUTLOOK:** Features a world map with various countries labeled (Canada, United States, Mexico, Colombia, Peru, Brazil, Argentina, Chile, Morocco, Egypt, India, China, Russia, South Africa, Australia, New Zealand). It includes statistics: Confirmed Uptrend: 40, Downtrend: 0, Uptrend Under Pressure: 5, and Rally Attempt: 1.
- WON EUROPE Today:** Jun 03, 2020. Text: "Yesterday, European markets gained 1.87%, reaching their highest level in almost three months, buoyed by optimism about the reopening of economies and stimulus measures. The Stoxx 600 gained 1.57% on higher volume, with gains in Insurance, Auto, Banks, and Oil & Gas stocks. The distribution day count for the index remains elevated at five. Among other main bourses, ..."
- WON GLOBAL View:** Jun 03, 2020. Text: "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq continue to press higher, trading above all major moving averages with limited distribution. Resistance is 3,136 on the S&P 500 and all-time highs on the Nasdaq (9,838). Near-term support is now the 10-DMA (S&P 500: 3010; Nasdaq: 9393) on both indices. Distribution stands at three days on the S&P ..."
- Video Player:** A video titled "May 28, 2020 - Updates on FB, SPLK, SWCH and more" dated May 28, 2020.
- O'NEIL MARKET VIEW:** Contains three articles:
 - May 29, 2020:** "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq rallied strongly for a second straight week, closing near weekly highs on Friday. Near-term support for ..."
 - May 22, 2020:** "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq continue to display resilient action, gapping up Monday and constructively holding gains throughout the ..."
 - May 15, 2020:** "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq staged back-to-back upside reversals to close the week, holding above key support levels and keeping ..."
- SECTOR SUMMARY:** Contains three 'Global Sector Commentary' articles by Kenley Scott:
 - May 29, 2020:** "Key points from this report: Global sectors (led by large U.S. -weighting) still not in full rotation mode. A few countries where the long-term lagging sectors Consumer Cyclical, Capital ..."
 - May 22, 2020:** "Key points: Market breadth remains improved globally (70% of stocks above 50-DMA) but still challenged in the bigger picture (34% of stocks above 200-DMA). Breakout totals have still yet ..."
 - May 15, 2020:** "Key points: Given that the entire 2020 selloff happened in just six weeks, the current market actually does not rank that favorably versus prior bulls if we track three months prior to bear ..."
- WON GLOBAL VIEW:** Contains two articles:
 - Jun 03, 2020:** "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq continue to press higher, trading above all major moving averages with limited distribution. Resistance ..."
 - Jun 02, 2020:** "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq climbed slightly higher on average volume with support at the 200- and 10-DMA, respectively. The ..."
- STRATEGY VIEW:** Contains three articles:
 - Mar 20, 2020:** "Key Points: This report provides several historical bear market examples and their depth/time, number of follow-through days, and a handful of stock leaders that emerged once the ..."
 - Mar 05, 2020:** "Attached is the latest Strategy View--Yield Curve from Randy Watts, our Chief Investment Strategist, and Global Sector Strategist Kenley Scott."
 - Feb 27, 2020:** "Key points: This week's selloff sent major indices to more than 10% off highs, just a few trading days from all-time highs. In this report, we detail past 10% or greater corrections in both bull ..."
- FOCUS LIST:** Contains four 'Alerts' items:
 - US Focus:** "The U.S. market remains in a Confirmed Uptrend. The S&P 500 and Nasdaq rallied strongly for a second straight week, closing near weekly highs on Friday. Near-term support for ..."
 - European Focus:** "On Thursday, the Stoxx 600 ended 4% above last Friday's close. Of the 17 indices that we cover, 15 are in a Confirmed Uptrend, and two are in an Uptrend Under pressure."
 - Global Focus Developed:** "Australia's ASX All Ordinaries Index gained 4.7% this week. It is trading 3% below its 100-DMA. The index added one distribution day this week and remains in a Confirmed Uptrend, with ..."
 - Global Focus Emerging:** "The CSI 300 rose 1.12% this week on lower volume and fell 1.16% for the month. The market remains in an Uptrend Under Pressure with six distribution days. The A-share market staged a ..."
- WEEKLY SUMMARY:** A table with columns for APAC, Europe, and LATAM, showing dates for reports: APAC (May 27, 2020), Europe (May 25, 2020), and LATAM (Jun 01, 2020).
- WEBINARS:** A section with a video player for "May 28, 2020 - Updates on FB, SPLK, SW" and another for "May 21, 2020 - Updates on ILMN, POOL, Z".

At the bottom of the dashboard, there are icons for SYMBOL, LISTS, COMPARE, RESEARCH, and NEWS, along with a 'Support' button.

3 Focus Lists
Entitled content based on our proprietary idea services.

4 Webinars
Timely analyst commentary of the current market outlook, historical precedent, actionable stock ideas, and global themes.

Streams

- 1 Stream Name**
Select to name your customized stream.
- 2 Sources**
Filter from a number of different news sources.
- 3 Keyword Filters**
Filter a stream by entering symbols, lists, or keywords.

The screenshot displays three columns of news streams. Each column has a header with a title, sources, and filters. The first column is titled 'My News Stream' with sources 'CNBC +18 more' and filters 'None'. The second column is 'Untitled News Stream' with sources 'Ars Technica +13 more' and filters 'None'. The third column is also 'Untitled News Stream' with sources 'Ars Technica +21 more' and filters 'Health'. Each column contains a list of news headlines with their respective dates and sources. At the bottom of the interface, there is a navigation bar with icons for 'SYMBOL', 'LISTS', 'COMPARE', 'RESEARCH', and 'NEWS', along with a 'Support' button and a notification icon.

- 4 Headlines**
Click on headlines to open the source article in your default browser.

- 5 Add Streams**
Create up to seven news streams in one console.