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Mobile Quotes 3

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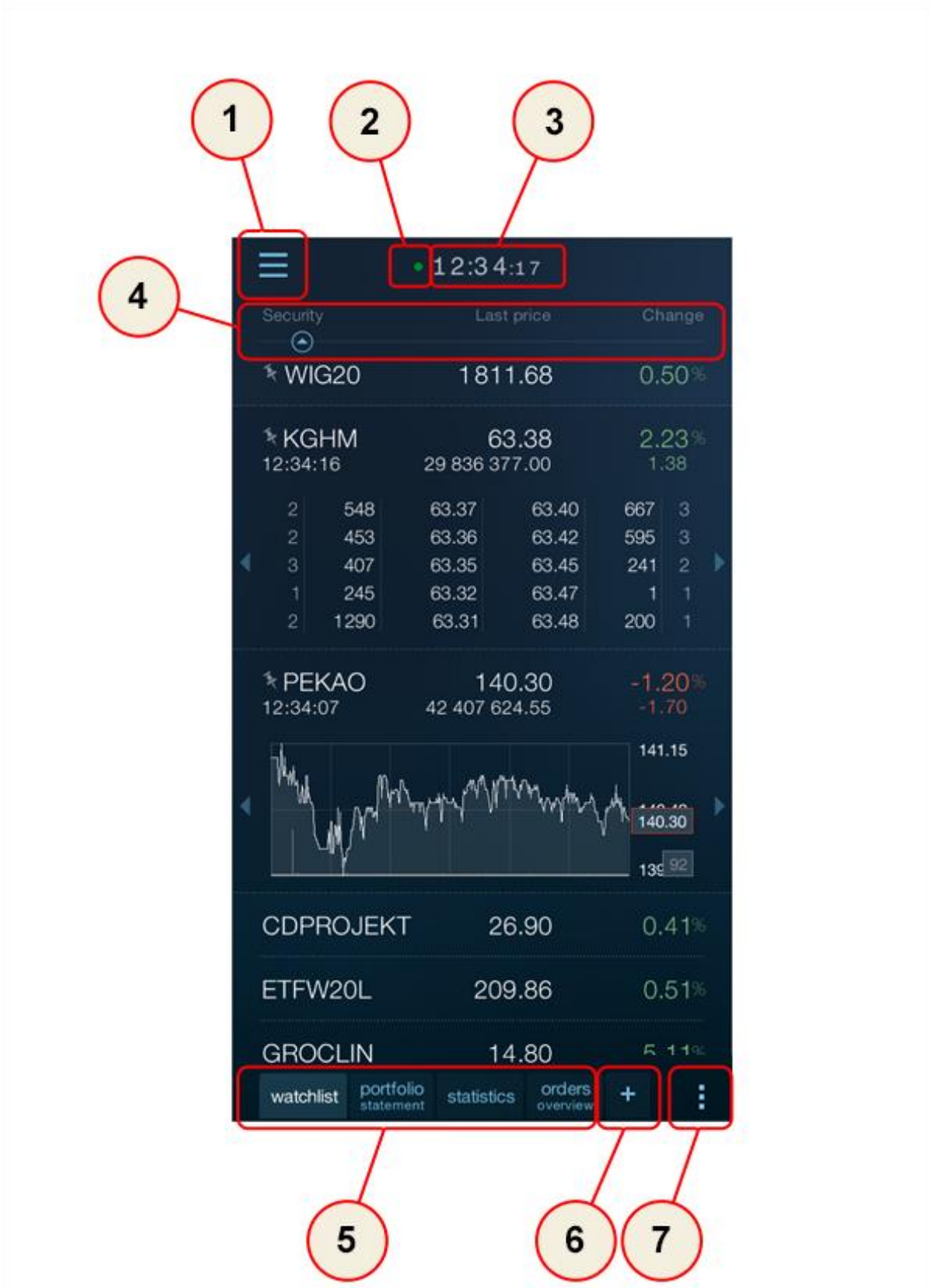
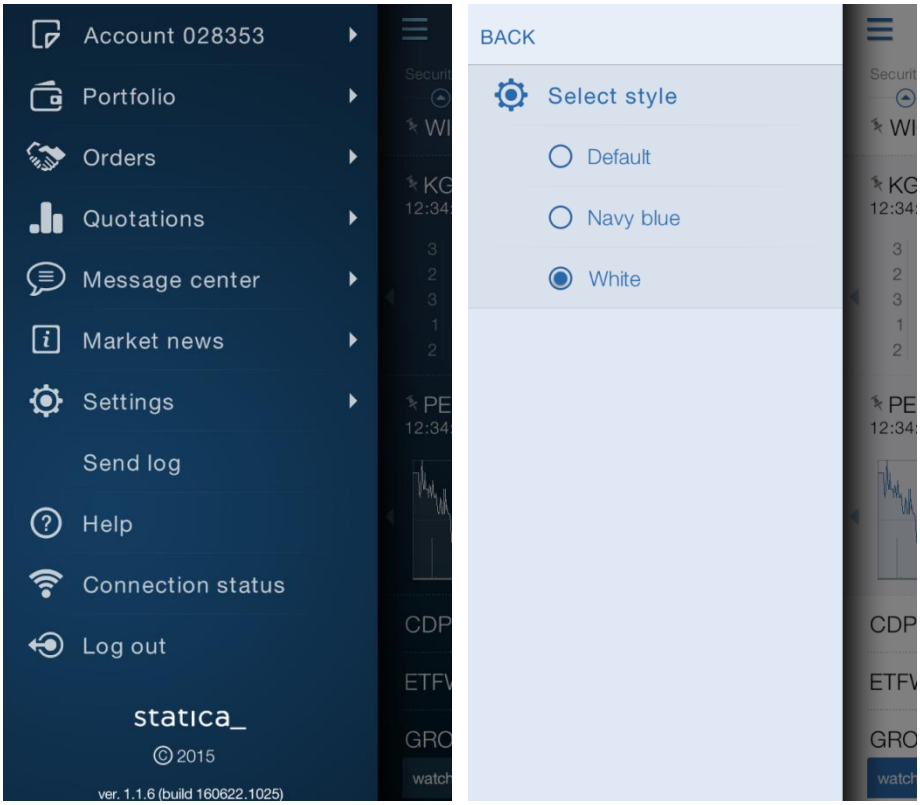
1. Basic user interface elements



1. Main menu
2. Connection status
3. Time of the last message
4. Table sorting header
5. Tab bar
6. Adding a new tab
7. Tab menu (e.g. Table)

Two color styles – navy blue and white are available in the application. The selection is made via the “Main Menu” then “Settings” and “Style”.



2. Introduction

Mobile Quotes is an application dedicated for tablets that enables to access stock quotes in real time from anywhere in the world, wherever Internet access is available. The program is intended for all investors who appreciate the convenience of fast, reliable access to information from the stock exchange.

In addition to quotes, the program provides the entire spectrum of analysis functions such as charts including any time range, intervals, chart types, and technical analysis indicators.

The investor can open any number of tabs with charts and detailed information on the securities.

3. Minimum requirements

Mobile Quotes 3 is designed for smartphones running iOS, Android and Windows Mobile operating systems.

Below are the detailed requirements for individual systems.

iOS

iPhone 4 (recommended iPhone 5S)

iOS 7

Android

Resolution: 320 x 480 (recommended 720 x 1280).

Processor: 1 GHz (recommended 2 x 1.2 GHz).

RAM: At least 1024 MB

Operating System: Android 4.1 Jelly Bean (recommended 4.4+)

Windows Mobile

Any phone running Windows Mobile 10 OS

The program can open any number of charts with possible high ranges of presented data, therefore it is not possible to determine the recommended version since this depends directly on how the program is used.

In any case, the program requires Internet access, which enables to connect sockets (packet data or WLAN connection).

Users who use additional software for securing their mobile phones (antivirus suites) should pay attention so that software does not block the connection, according to the parameters described on website http://serwery.statica.pl

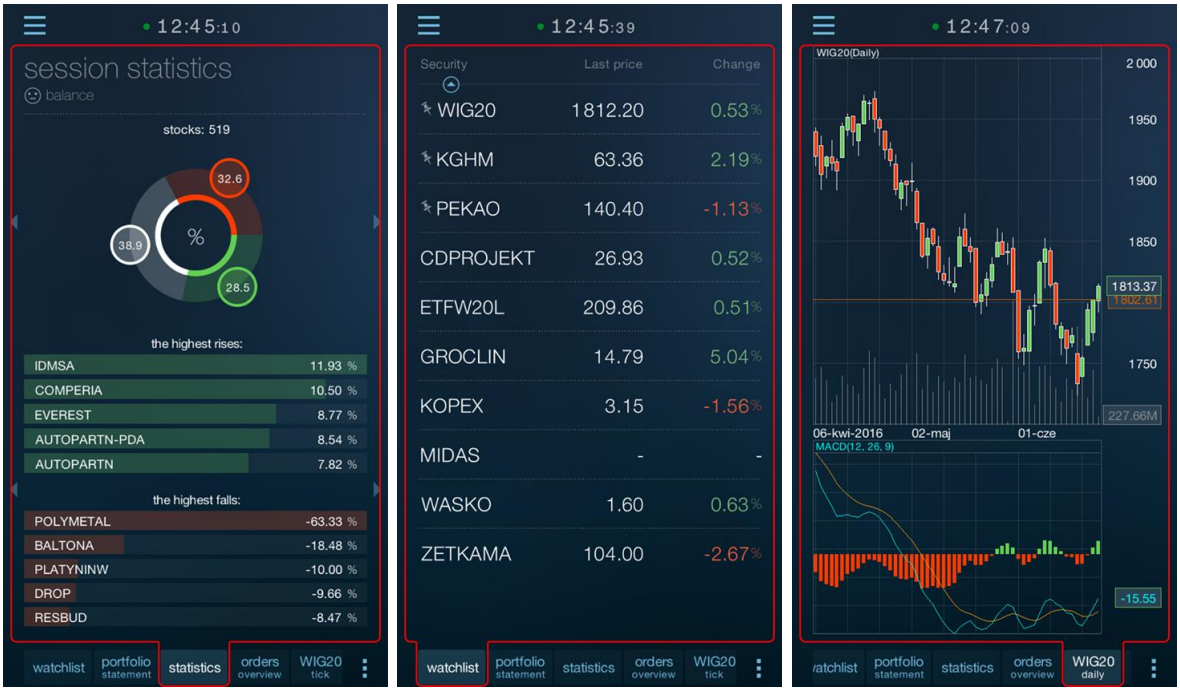
The application is designed for smartphones only. There is a dedicated version for tablets (Mobile Quotes 3 MAX).

4. Tabs

The tab is the primary interface element, which provides a separate functionality (table, statistics, chart,…).

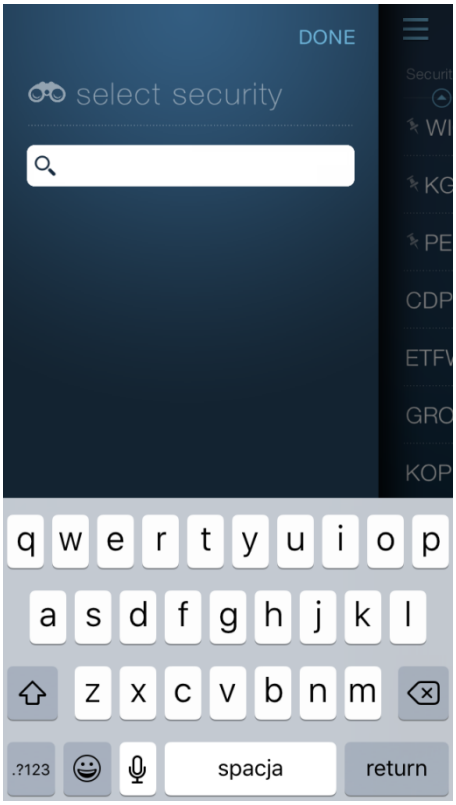
You can open any number of tabs.

The tab which is active at any given time fills the entire screen. Tap on the tab header to change the tab.



4.1. Security selection window

The security selection Window is used to select the security inserted into the table, or the security being the context of the single-security tab (details and diagram).



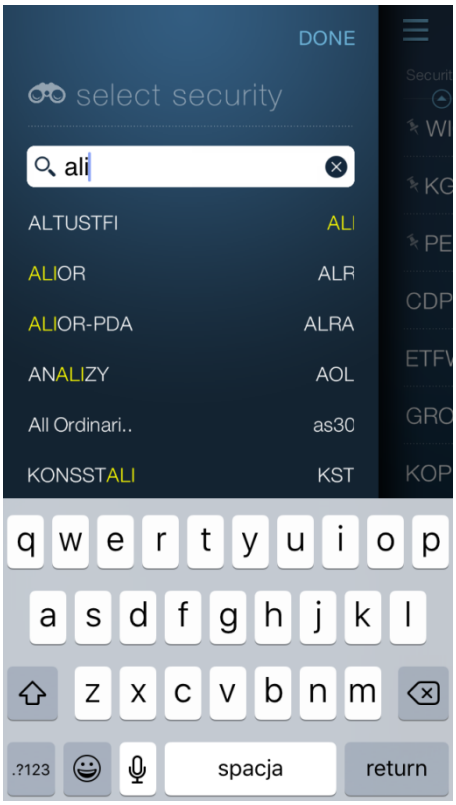
For the tabs other than the watchlist, the program automatically prompts securities, which the user may be interested in. In such a case, the list includes all securities used in any way in the program.

Tapping on the security name in the list inserts the security into the target tab.

The program also enables to search among all securities listed on a given day.

To do this, start typing the name or abbreviation of the security in the edit field at the top of the security selection window.

When typing the characters, the list of matching securities will be narrowed bit by bit.

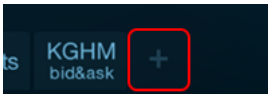


The selection of the security closes the window. The exception is the insertion of the security into the table. In such a case, you can insert multiple securities simultaneously. After entering and/or selecting one name, the program enables to enter the next one without having to re-open this window.

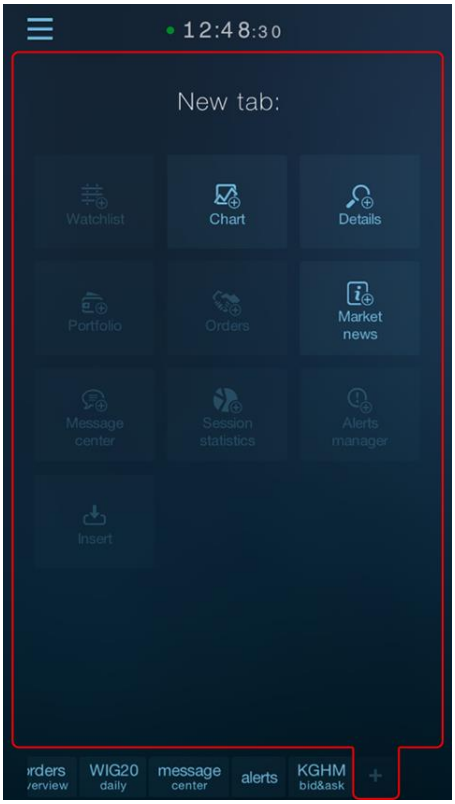
In such a case, the security selection window closes after pressing the “ready” buttons located in the upper right corner of the window.

2.2. Adding a new tab

If you want to open a new tab, press the “plus” button in the tab header.



The panel shows the tabs which you can place.



Some tab types may not be available because they have already been placed and they can only be opened in one copy.

If inserting a new tab requires selecting the security for which it opens, the program displays a security selection dialog before inserting a new tab.

If the tab containing the security (of the type compliant with the one selected in the menu) is not yet open, the program will open it automatically and fill it with the information of the selected security.

If the security has an expanded row, you can quickly fill in the security tab with the suitable type of information by tapping the expanded row briefly.

4.3. Deleting a tab

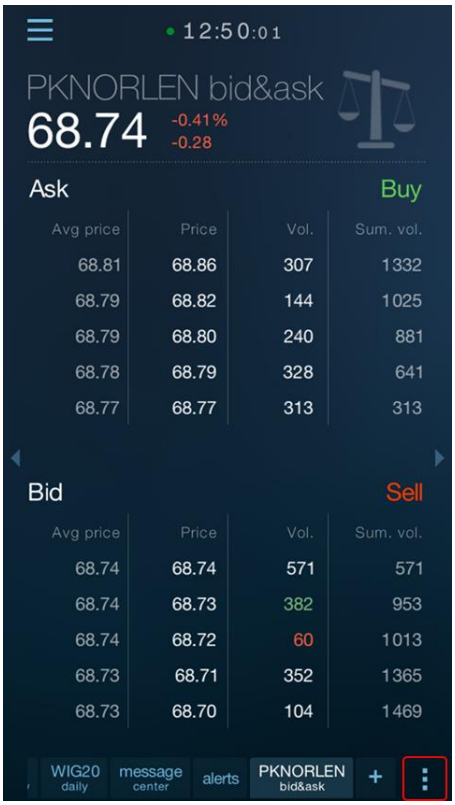
To delete the tab, select “Delete” from the pop-up menu.

To call up the tab’s pop-up menu, hold the tab header for about two seconds.

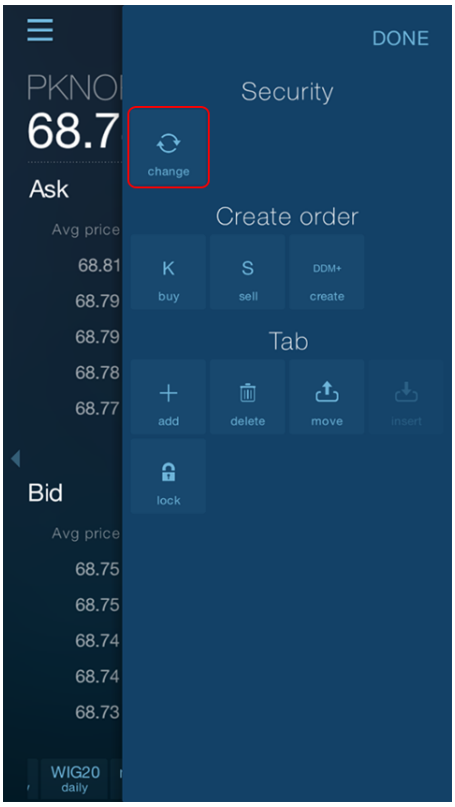
4.4. Replacing the tab contents

The tabs displaying information related to one security (and thus the details and charts) enable to replace the security while keeping all settings of this tab.

To replace the security, display the tab's pop-up menu by pressing the pop-up menu button located in the lower right corner of each tab.



Then select “Change” (or “Change Security”) at the top of the menu.



The security selection screen appears as a result of this operation. The contents of the tab will be changed after pointing to the new security.

4.5. Populating the details tab from the watchlist

Quick replacement of the security tab content (details or chart) is possible from the watchlist.

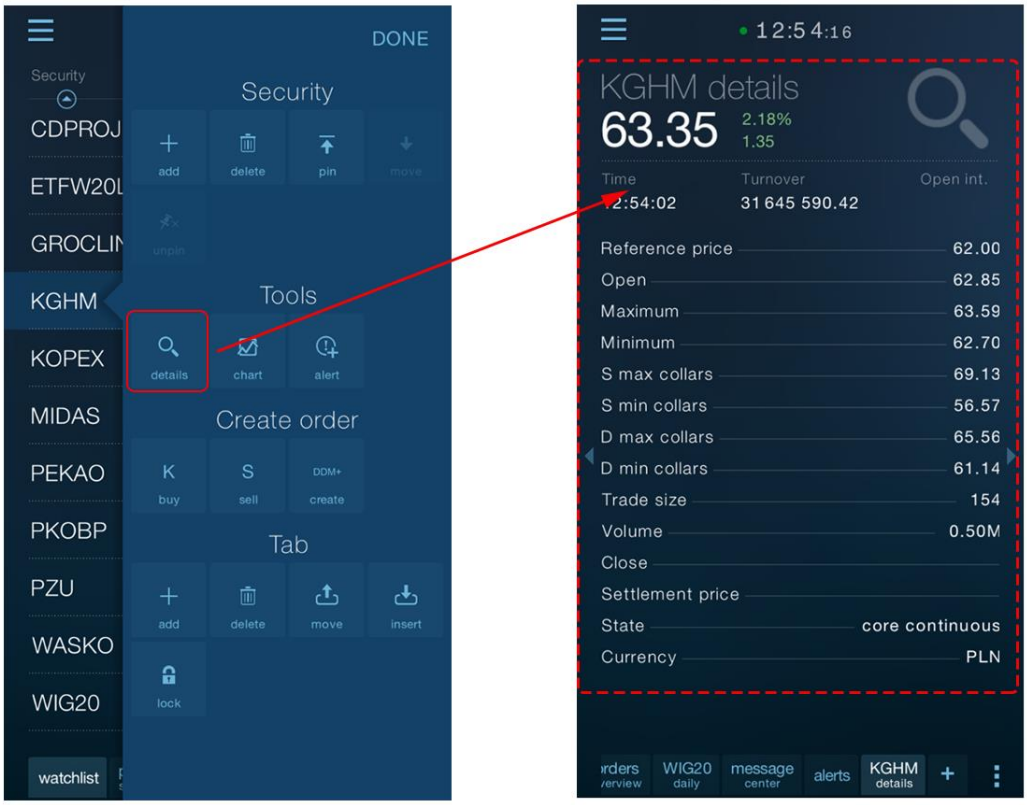
In this way you can change only the contents of the tabs in the right pane on the first screen.

Display the pop-up menu of the watchlist . A small arrow at the left edge of the menu indicates the security on which you will be able to perform an operation (more on this in the chapter “Watchlist/Security context in the pop-up menu.”

Tap the security in the table to change it. The arrow will move.

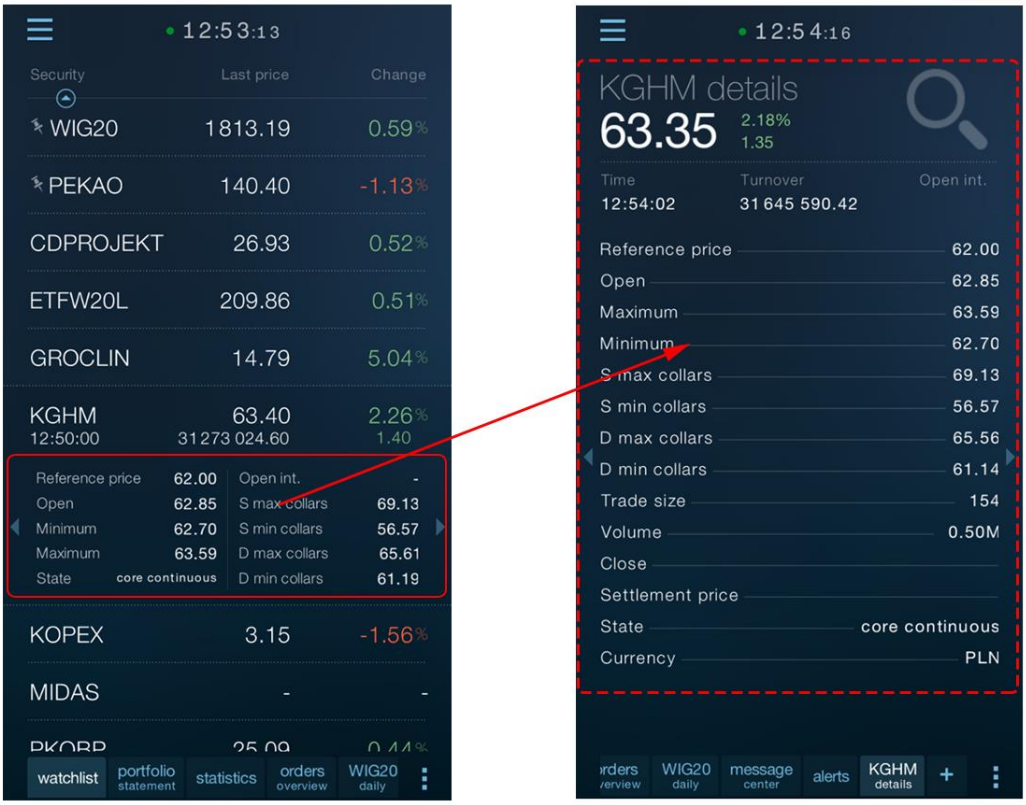
You can also open the table’s pop-up menu right away indicating the selected security. For this purpose, do not press on the pop-up menu button to open the menu, but hold your finger on the selected security for about two seconds.

When the pop-up menu is open, and the arrow indicates the correct security, select one of the command from the “Tools” group. When selected, the existing security tab (with the type compliant with the one selected in the menu) will be replaced.



If the details panel is not yet open, the program will open it automatically and will with the information of the selected security.

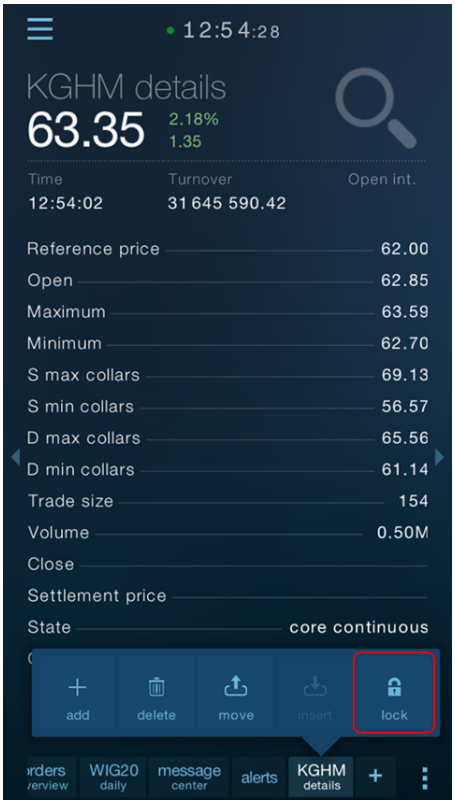
If the security has an expanded row, you can quickly fill in the details tab with the suitable type of information by tapping the expanded row briefly.



4.6. Blocking the tabs content

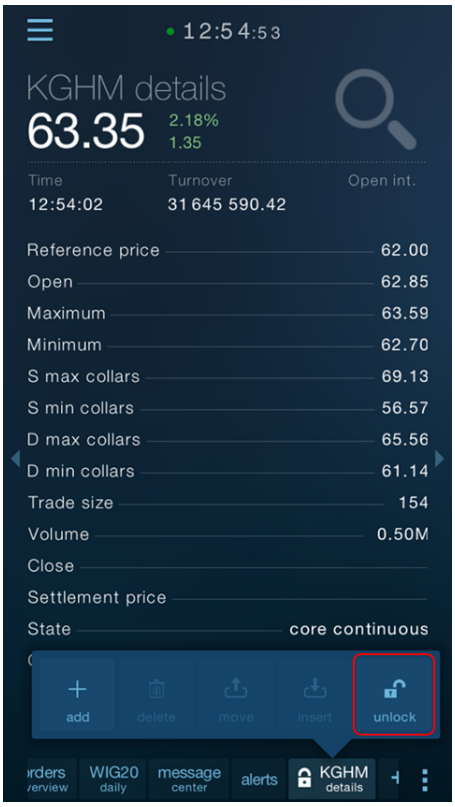
If several tabs with security details or charts are open, you may want to protect against accidental tab contents replacement (from the watchlist).

To do this, hold the tab header for about two seconds and then select “lock” from the tab header pop-up menu.



You will not be able replace the security in the tab after doing this, and the tab header will be marked with a padlock icon.

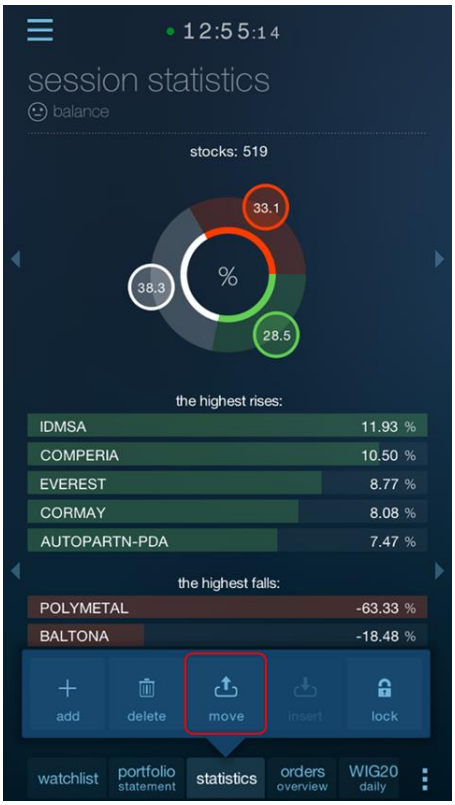
Press the “unlock” command in the same location to unlock the tab.



4.7. Moving tabs

You can move the tabs to change their order.

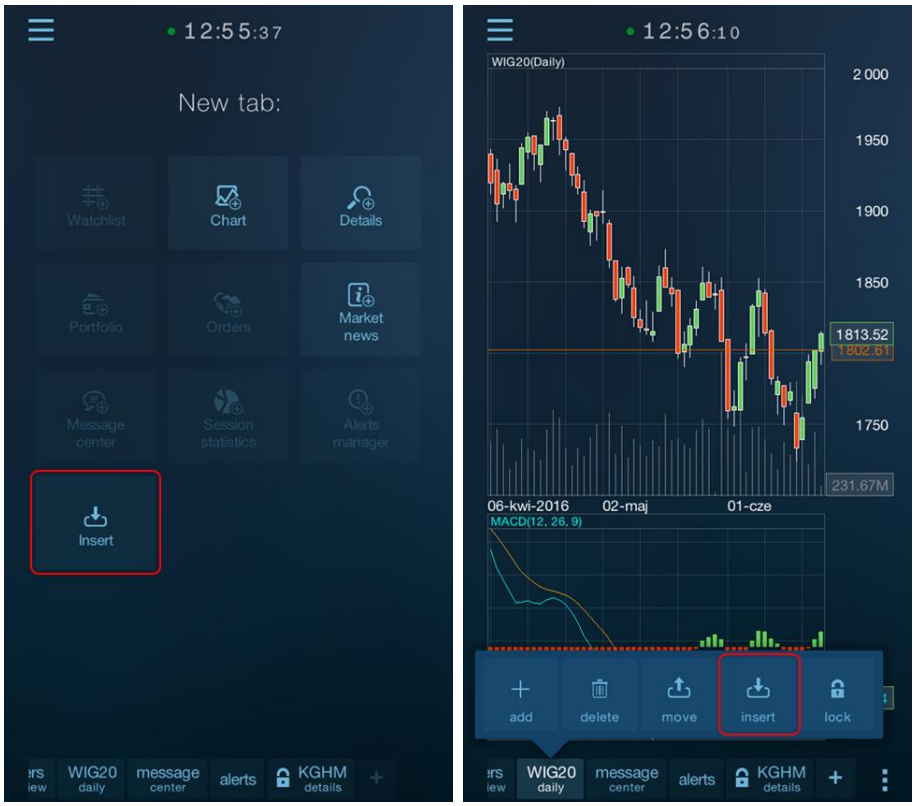
To move a tab, select “move” from the tab header pop-up menu (tap and hold the header for about two seconds) and select “insert”.



You can select the “insert” command in two places: on the panel for adding a new tab and from the tab header pop-up menu.

In the first case, the tab will be moved to the end of the tab list.

In the latter case, the tab will be moved in front of the tab from which the pop-up menu was called.



5. Watchlist

Watchlist is the main type of a tab in the program.

You can place the watched securities in the watchlist.

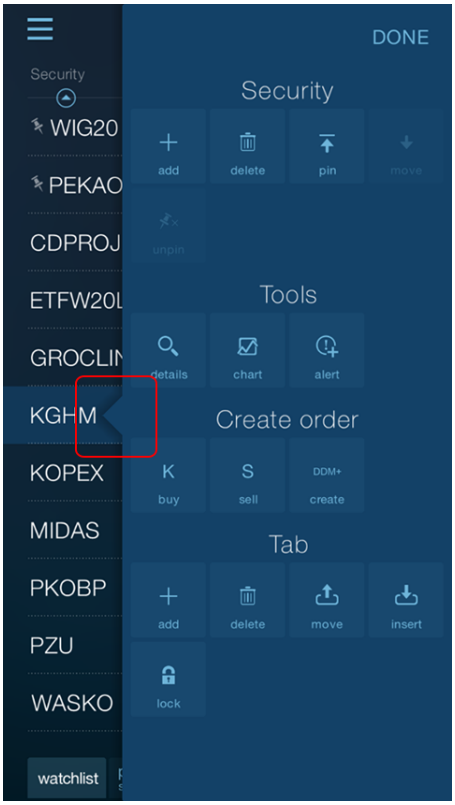
It includes three columns, the meaning of which is described in their headers (Security, Last price and Change).

5.1. Security context in the pop-up menu

In contrast to pop-up menus in other types of tabs, the menu of the watchlist works in the context of the selected security.

As a result, it is possible to remove and shift a specific security in the table as well as to complete the tab details from the table.

The security on which pop-up menu operations will be executed (if relevant to the security) is indicated by a small arrow next to the left edge of the menu.



Tap the security, which is subject to the operation in the table to change it. The arrow will move.

You can also open the table's pop-up menu right away indicating the selected security. For this purpose, do not press on the pop-up menu button to open the menu, but hold your finger on the selected security for about two seconds.

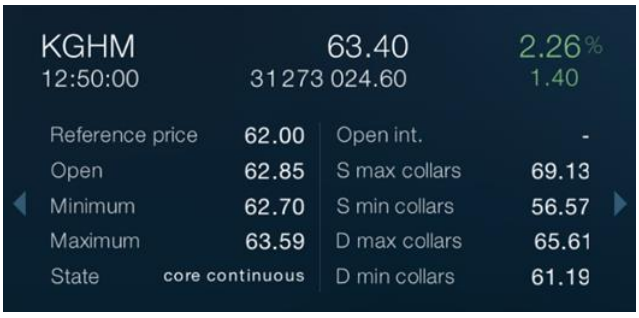
5.2. Expanded rows

By tapping the row for a security expands it so that the security gets an additional inner panel in the table that shows extended information.

You can scroll the expanded security row to the right and left using the scroll gesture.

The following internal panels of the expanded security row are available.

Additional information



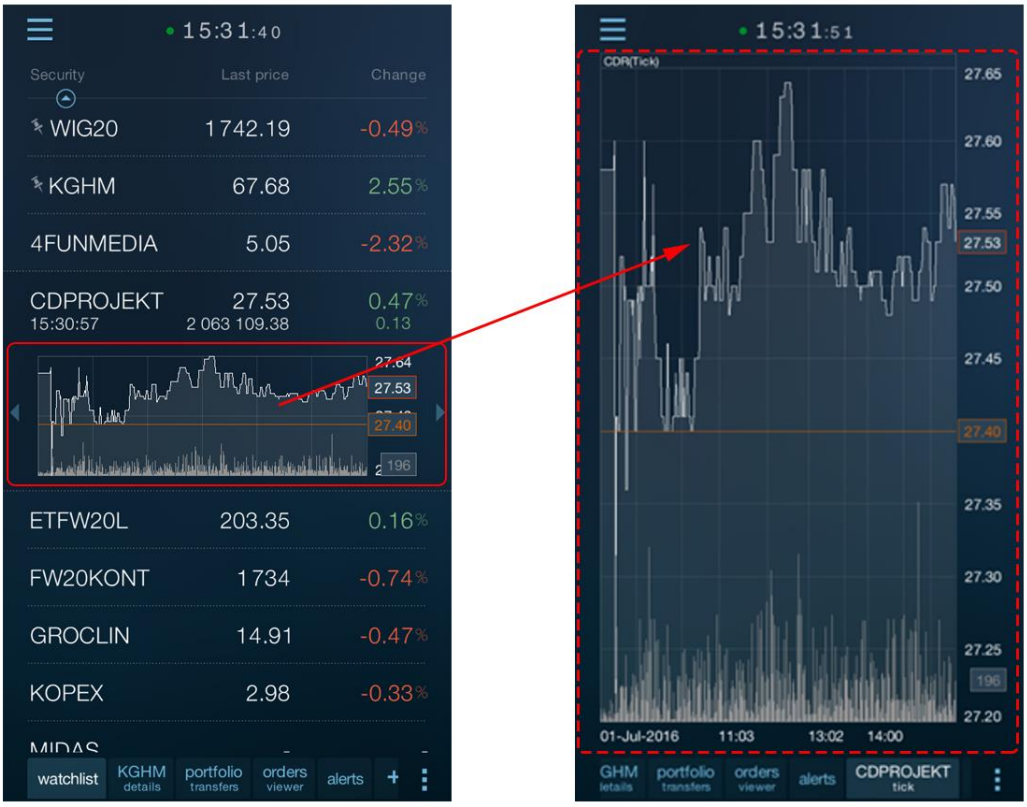
Bid and Ask

Trades

Chart

The first three security internal panels have their counterparts in the security details tab. Briefly tapping the selected type of information (details, trades, bids and asks) populates (or opens) the applicable security tab.

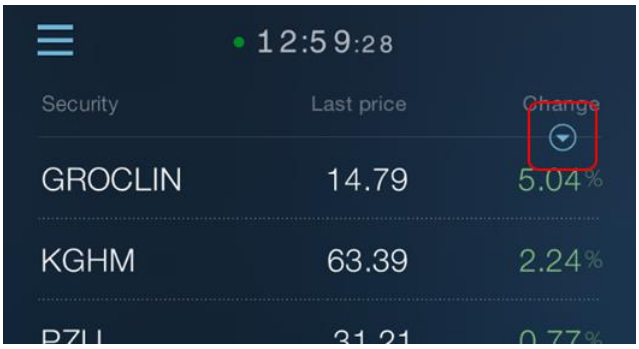
Similarly, the chart panel leads to the chart tab.



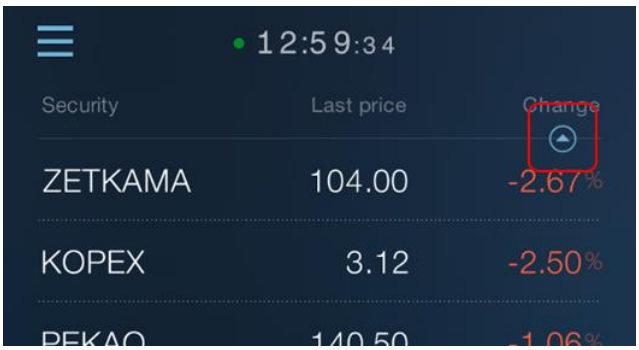
5.3. Sorting

Tap the column heading by which the table should be sorted to sort the table.

The column by which the table is sorted is marked accordingly.



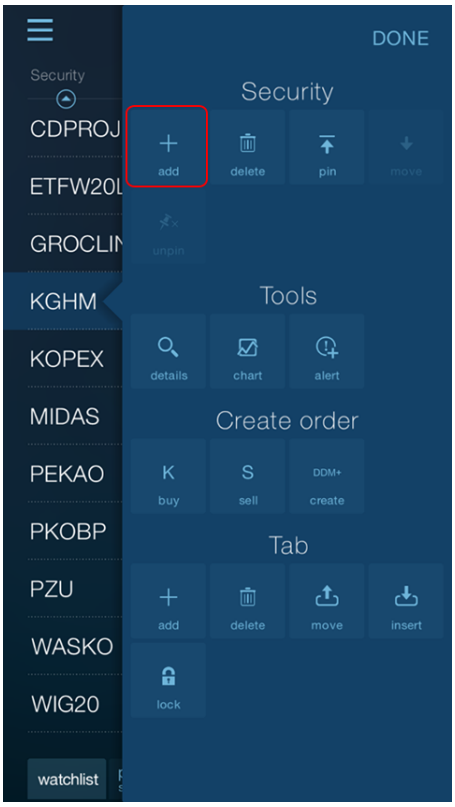
Tapping on the column header again changes the sort direction.



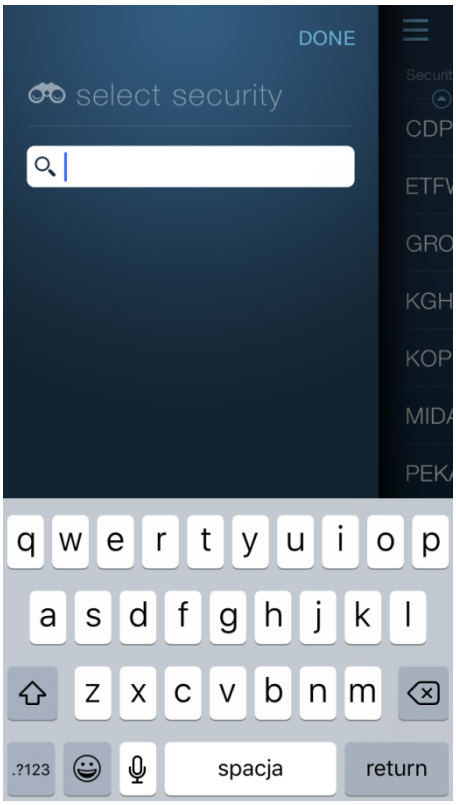
Sorting is updated every few seconds.

5.4. Adding and removing securities

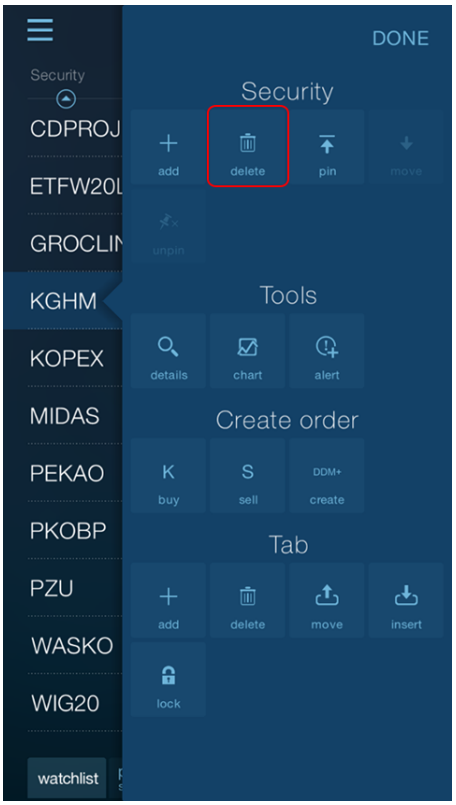
Press the table pop-up menu button (bottom right corner of the panel) to add a security to the table , then select “Add” from the “Security” group.



Security selection window will appear that enables to add one or more securities to the watchlist.



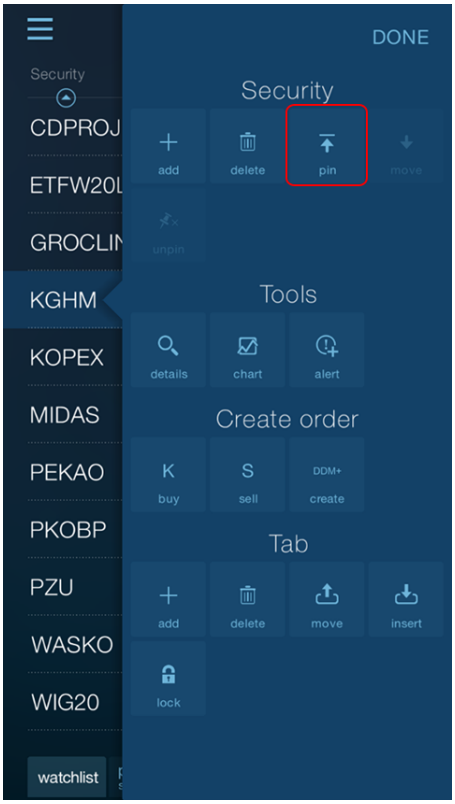
Hold the security row for two seconds, and then select “Delete” from the pop-up menu located in the “Security” group to remove the security from the table.



5.5. Moving securities

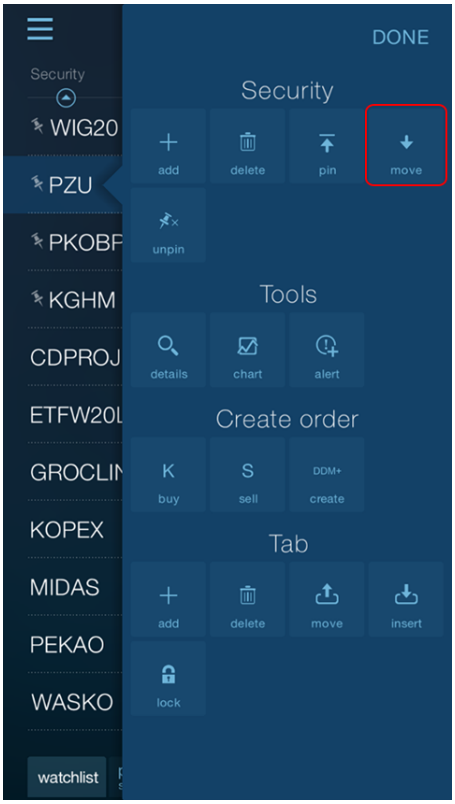
The program enables to move selected securities to the beginning of the watchlist.

To move the security to the beginning, select “pin” from the table’s pop-up menu.

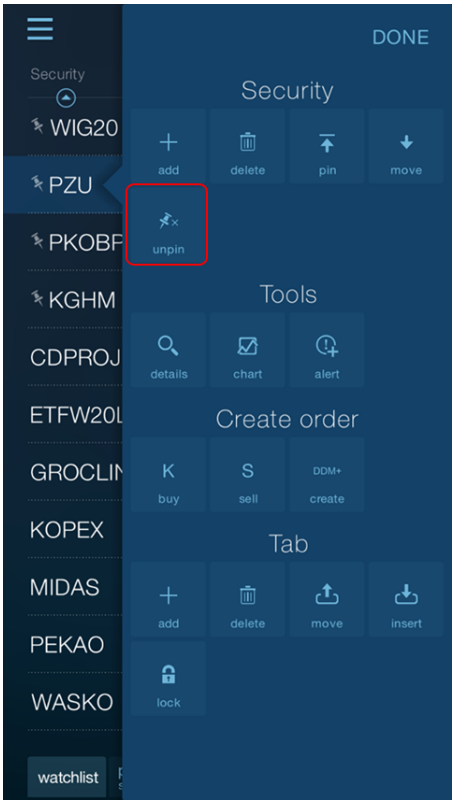


The security will be moved to the beginning of the table and additionally marked with a pin icon.

To move the pinned security one item down, use the “move” command.

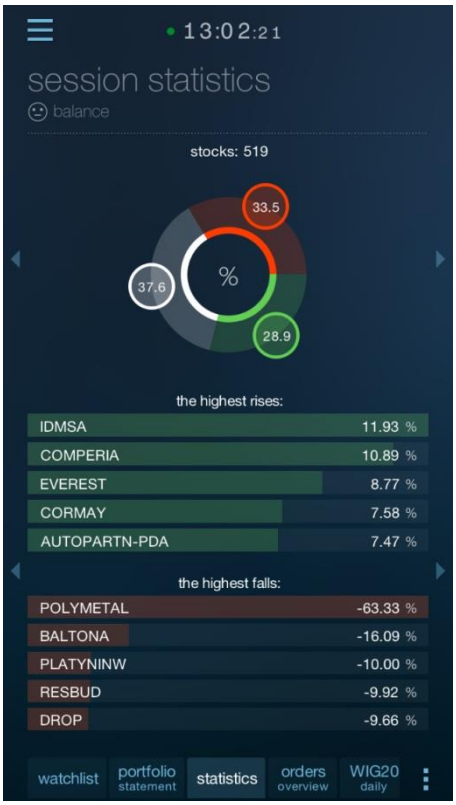


To restore the security to the position resulting from the sort order of the table, use the “unpin” button in the table’s pop-up menu.



6. Session statistics

Session statistics tab shows the current session status in an aggregated form. Session statistics is updated approximately every 15 seconds.



The top panel showing a pie chart and a bottom panel, showing the list of securities can be scrolled independently.

Pie charts show, respectively:

- Percentage of stocks rising, falling, and unchanged

- Percentage of turnover for stocks, respectively, rising, falling and unchanged

- Percentage of the number of trades for stocks, respectively, rising, falling and unchanged

There is information shown above the pie charts about the number of stocks included in the statistics, turnover on the session, and the number of trades.

There are four panels below the pie charts section showing five stocks having, respectively:

- The biggest rises

- The biggest falls

- The biggest turnover

- The largest number of trades

All presented information applies to the current session.

7. Security tabs

Security tabs show information related to only one chosen security. The details tabs provides three screens showing distinct types of information. These are:

Bid&Ask

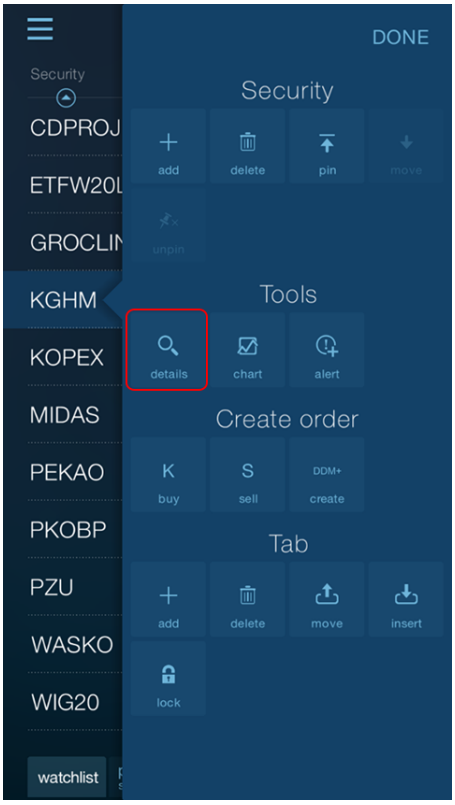
Details

Trades

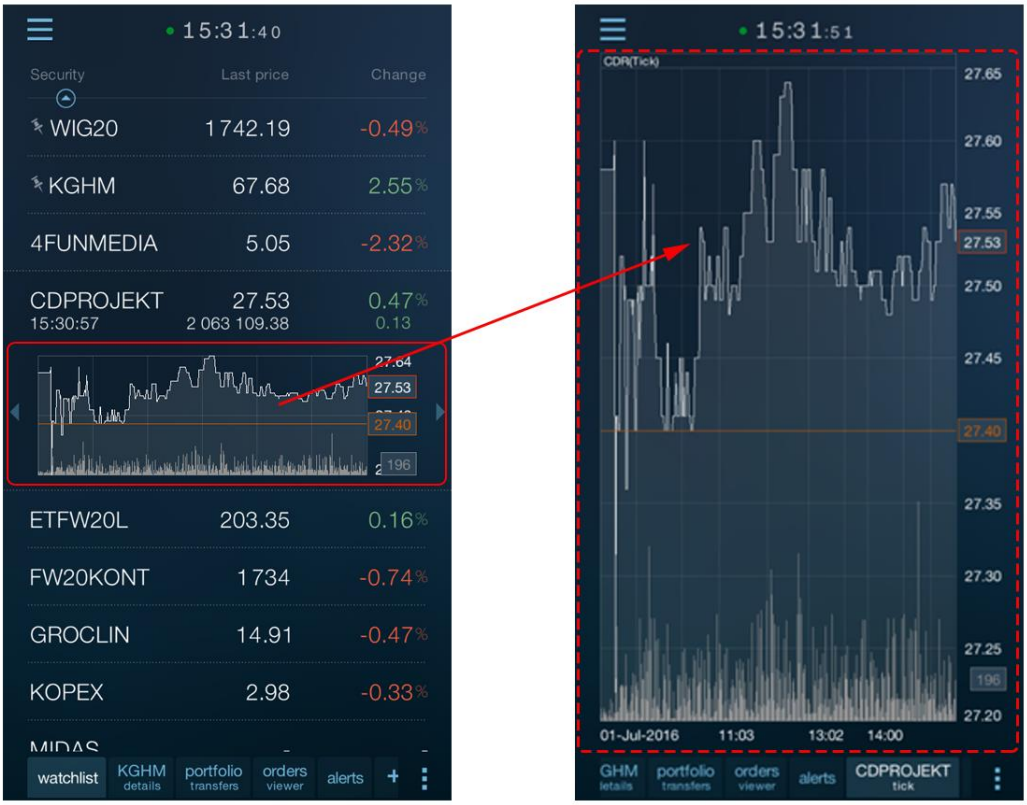
In order to switch between details tab screens, scroll them left or right using the scroll gesture.

You can open any number of security tabs.

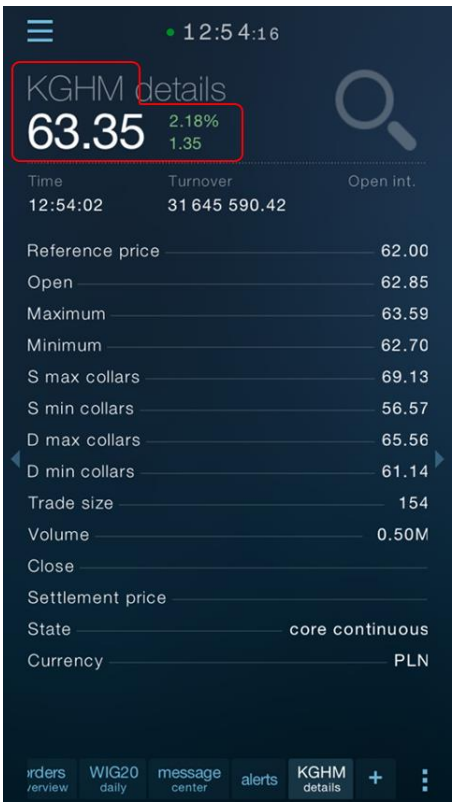
To open or populate the existing security tab, select the “Details” command in the “Tools” group in the context menu of the watchlist.



An alternative method of filling a security tab is tapping the expanded security panel in the table.

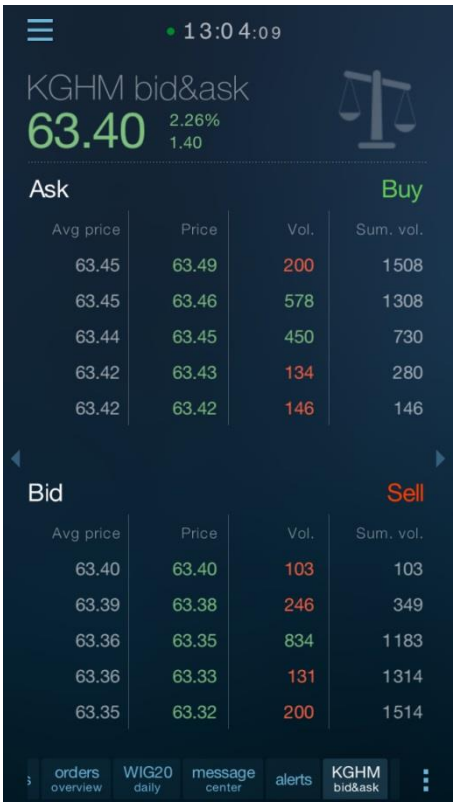


The upper part of each screen in the security tab shows the same header with information on the current security price and its daily changes: percentage and points.



7.1. Bid&Ask

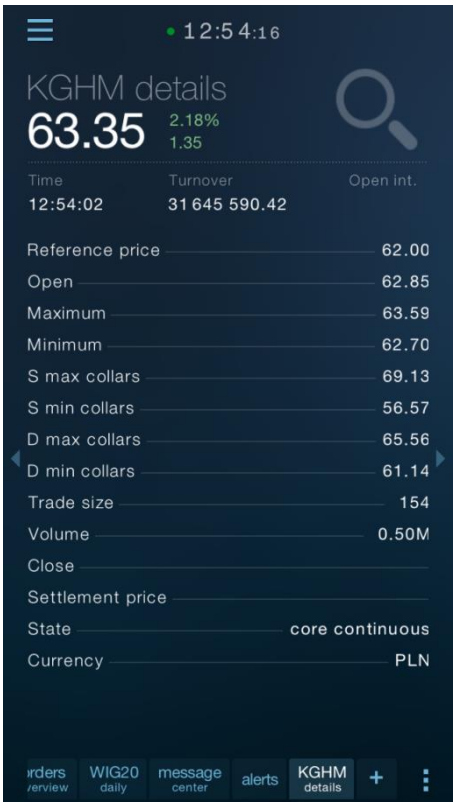
Bid&Ask subscreen contains a view of Bid&Ask table where, depending on the user privileges, up to five Bid and Ask rows are shown for the selected security.



In addition to the price and volume of orders from a given Bid&Ask row, information about the average Bid price if you accept the Ask from a given Ask row is also shown. There is also information on the summary volume of Bid&Ask up to and including a given row, which contains information on the number of units of the security that you can buy or sell when deciding on the price of a particular row.

7.2. Details

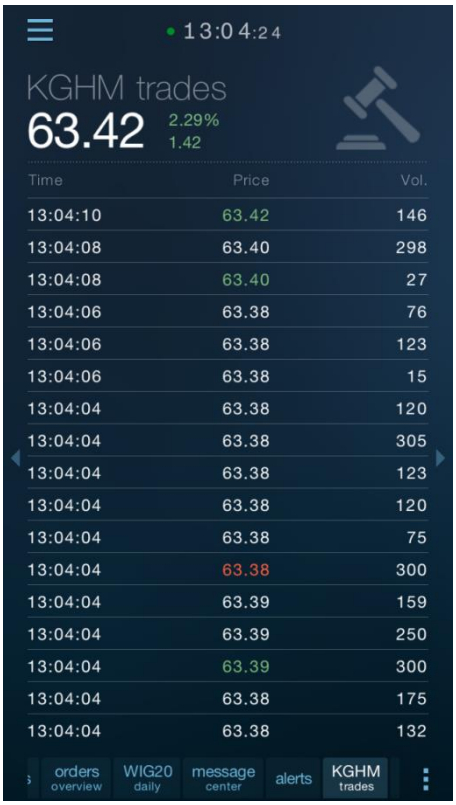
Details include the view of detailed information about the selected security.



7.3. Trades

The sub-screen contains the full list of trades executed on the selected security. The list contains information about the time and price and the volume of trades and the LOP value (if any).

Changes in the trade price in relation to the price of the previous trades are colored in accordance with the direction of this change.



8. Charts

The application enables to open any number of chart tabs.

The program provides access to the entire spectrum of tools and options for technical analysis of security trading on the charts. These are:

- Adjustable time ranges for the presented data of any length

- Zooming and panning the range of data in the chart

- Horizontal fullscreen mode

- Four chart types (line, column, candlestick, and bar)

- Many available time intervals

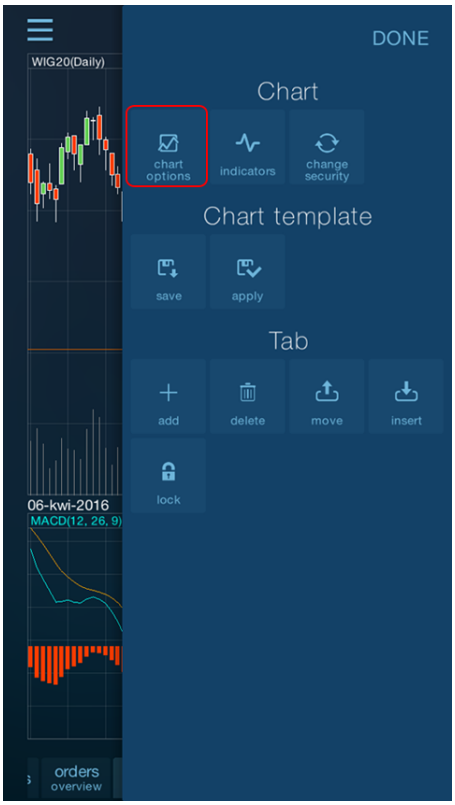
- Daily data unlimited as to the scope of quotes

- Technical analysis indicators with the capability to adjust their parameters

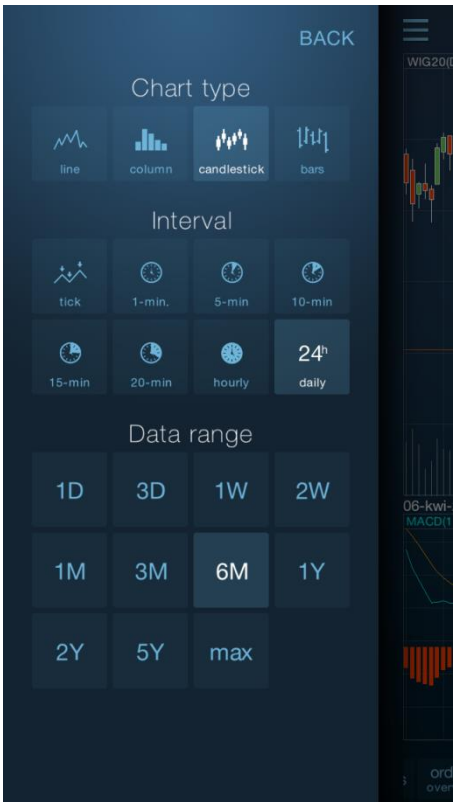
8.1. Chart settings

Chart settings include its type, interval, and the range of visible data.

To change one of these parameters, select “Chart settings” in the “Chart” group of the chart tab context menu.



Each chart tab provides independent settings.



To close the chart settings window, press the “READY” button or tap the screen outside of the settings window.

8.1.1. Type

The program enables to switch between chart types:

- Line

- Column

- Candlestick

- Bar

Candlestick and bar charts are only available for charts with the interval higher than a tick.

8.1.2. Interval

The program enables to switch aggregation data on the chart between the following intervals:

- Tick (each transaction)

- One minute

- Five minutes

- Ten minutes

- Fifteen minutes

- Twenty minutes

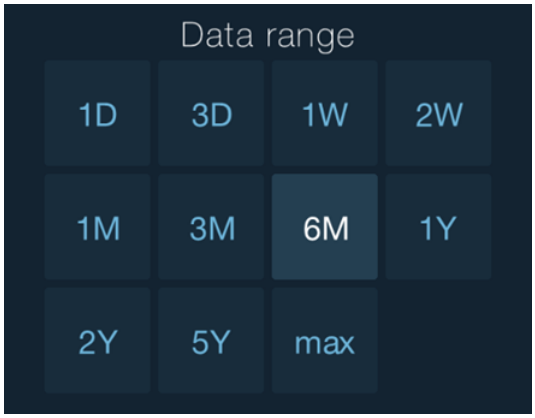
- Hours

- Days (EOD)

The interval change can automatically change the number of sessions presented at the default for a given interval.

8.1.3. Data range

You can change the data range shown in the chart using the commands in the “Data Range” group in the chart settings window.



Available data ranges are:

- One day

- Three days

- Week

- Two weeks

- Month

- Three months

- Six months

- Year

- Two years

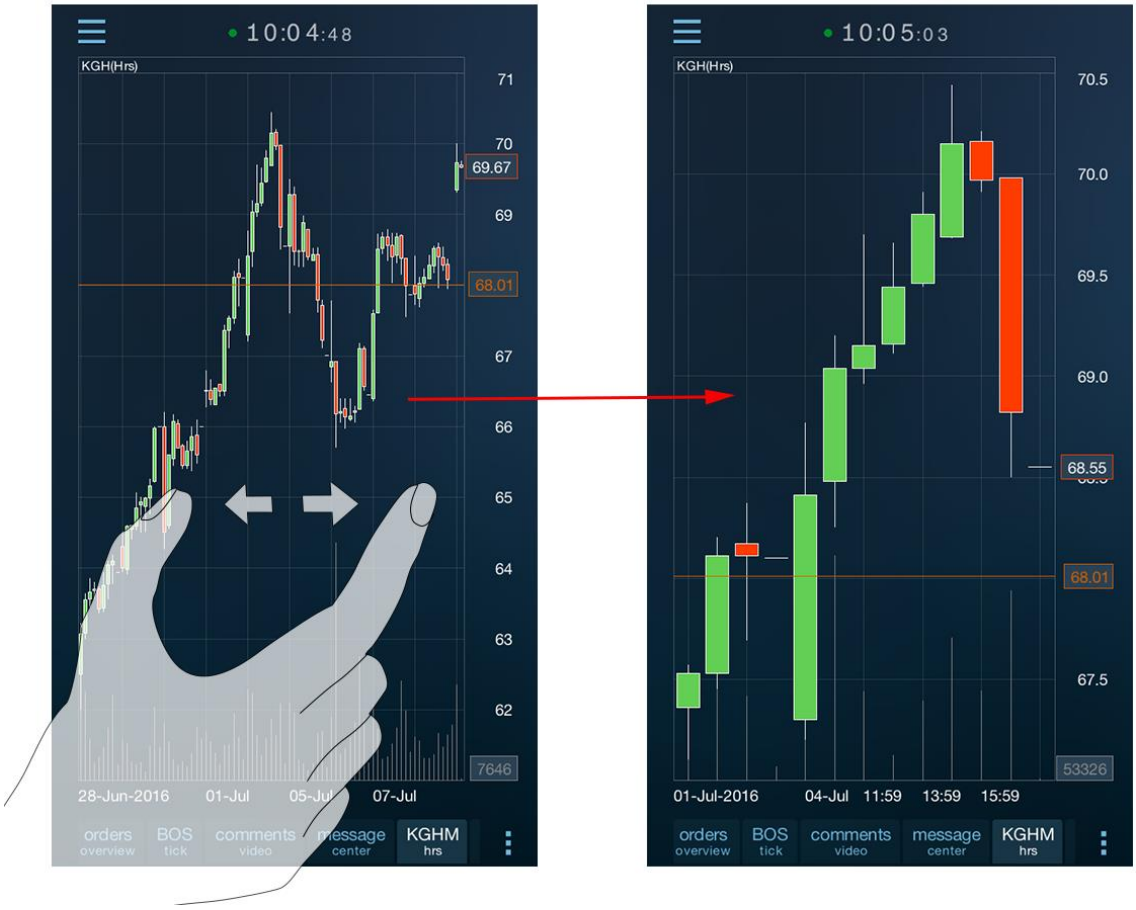
- Five years

- Maximum allowable for the selected interval type

8.2. Zooming

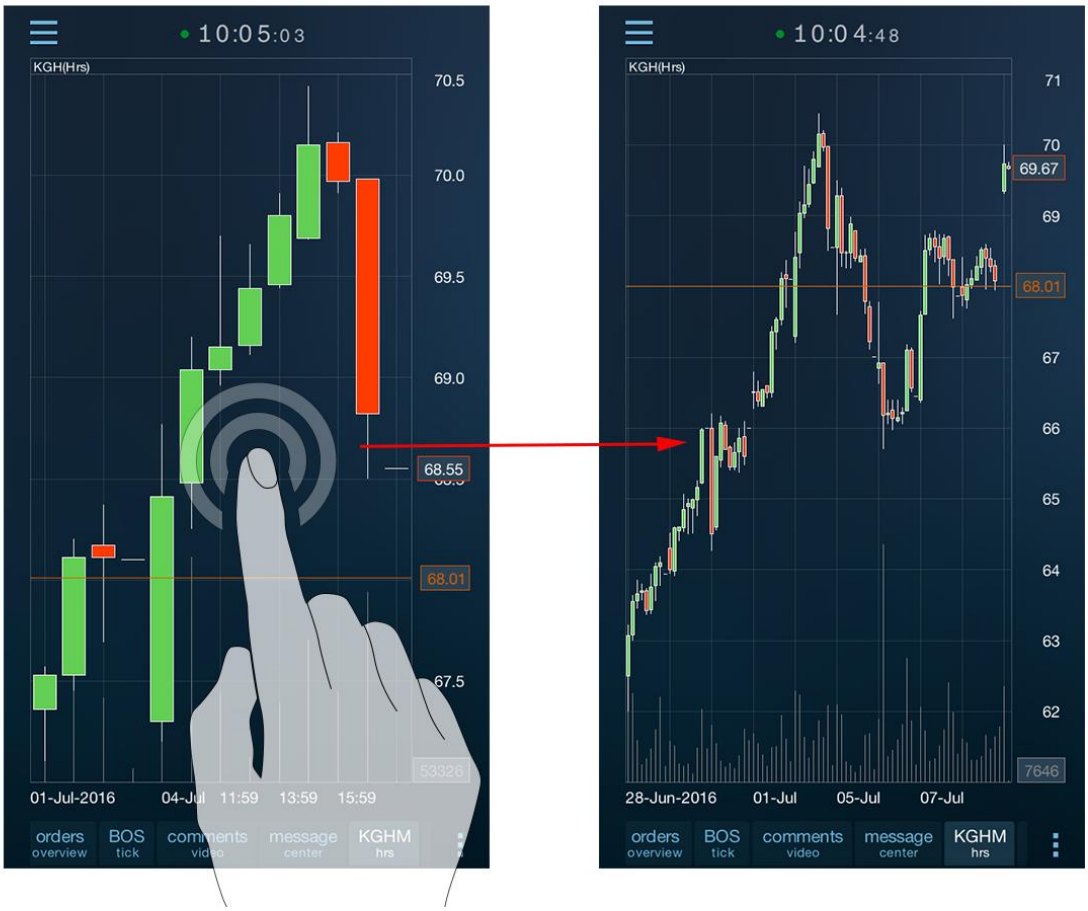
The application enables to zoom the chart.

Use the zoom gesture (move two fingers out to the sides) to zoom in on a chart.



You can move the visible range of data in an enlarged chart. To do this, slide your finger across the screen.

Tap the chart twice quickly to restore the full range of data (cancel the zoom).



8.3. Fullscreen mode

You can temporarily enlarge each chart in the program to full screen.

To do this, rotate the device to horizontal position.

8.4. Technical analysis indicators

The program provides a variety of technical analysis indicators.

Some of them (averages, Bollinger Band) are put in the prices panel.

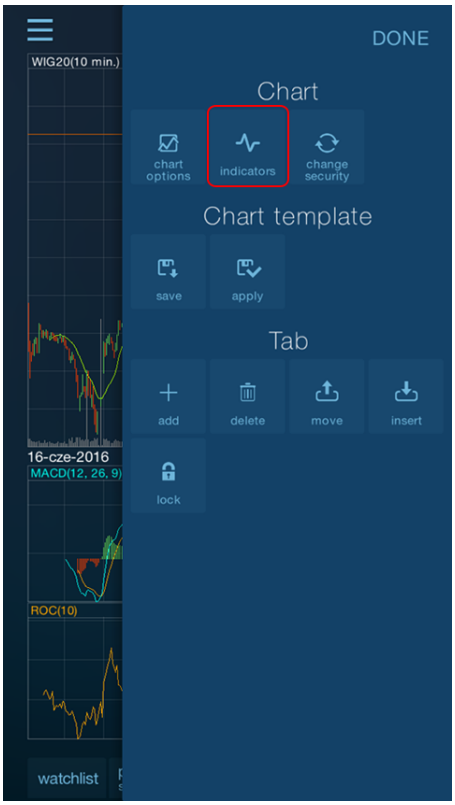
Indicators whose interpretation logic is not directly linked to the price (they have a separate values axis) are shown in a separate inner panel of the chart.

In such a case, each indicator is shown in a separate inner panel of the chart.

The chart tab may contain a maximum of three internal indicator panels (but this does not limit the placement of indicators in the price panel).

8.4.1. Adding and removing

Select “indicators” command from the chart’s pop-up menu to add an indicator.



The available list of indicators does not fit entirely on the screen. Therefore, you can scroll it up and down.

In addition to the management of visible indicators, you can also hide the volume and LOP (if available for the security) in the indicators window.

To activate the selected indicator, tape the switch icon located next to its name.

Indicator will be placed in the chart window immediately.

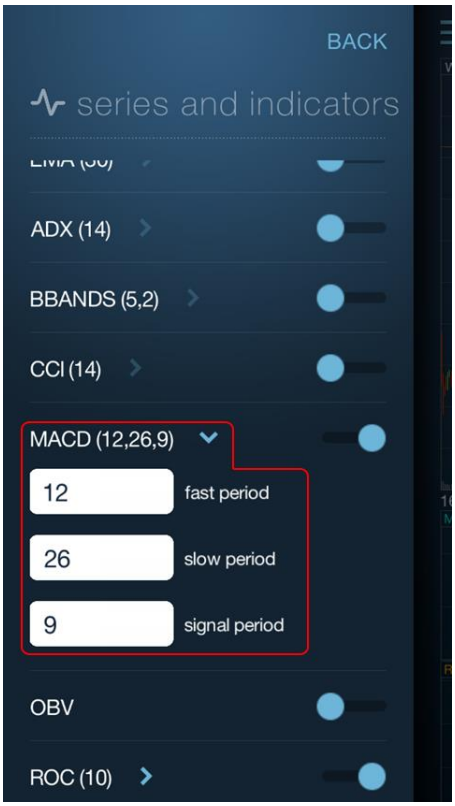
Tap the switch with the name of the indicator again to remove the indicator.

Close the “Series and indicators” window with the “BACK” button.

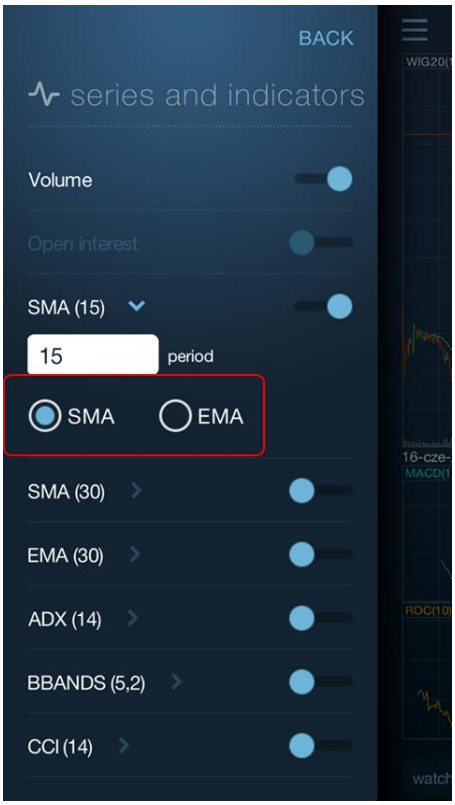
8.4.2. Changing the parameters

To change the parameter of the indicator placed in the chart, tap the name of the indicator in the “Series and indicators” window.

The list of parameters whose modifications the program allows for a given indicator will be expanded.



In the case of averages, there is an additional parameter which is the average type. The program enables to choose between the simple moving average (SMA) and the exponential moving average (EMA).

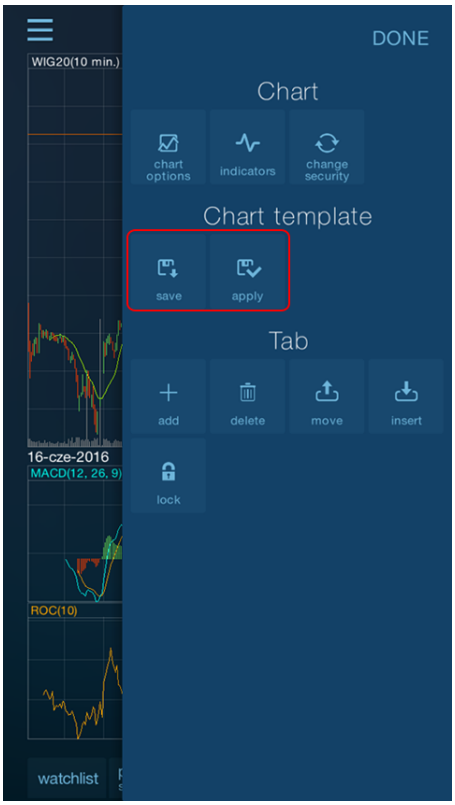


8.5. Chart template

Each new chart tab assumes the initial settings (chart type, interval, data range,…) specified in the installation settings of the program.

You can change these settings by copying the current settings for one of the open charts.

To do this, select “Save” command from the “Chart template” pop-up menu of the chart tab.



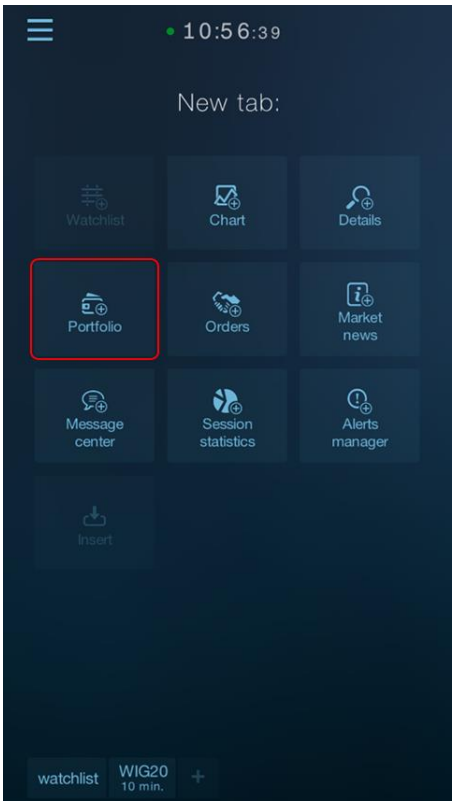
From now on, each new chart accepts the settings copied to the template.

You can apply the changed template to open charts as well.

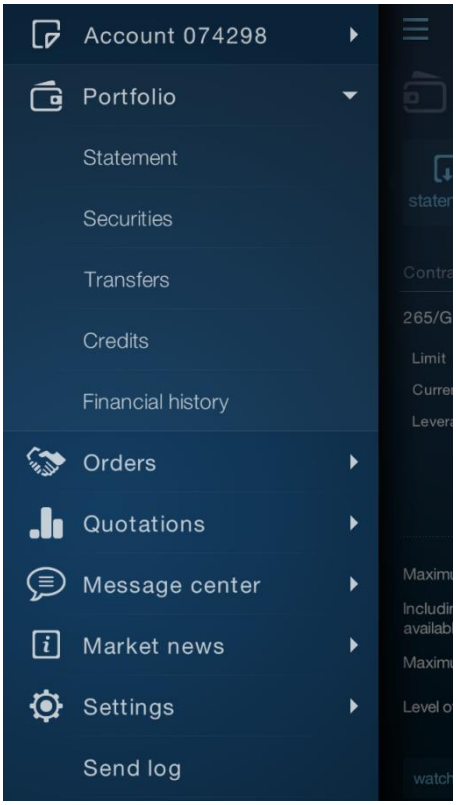
To do this, select “Apply” on the tab of the chart whose settings you want to change to the ones saved in the template. The chart will change.

9. Portfolio

To check the **status of your finances**, open the portfolio window in the application.
To do this, select Portfolio in the screen for adding a new tab.



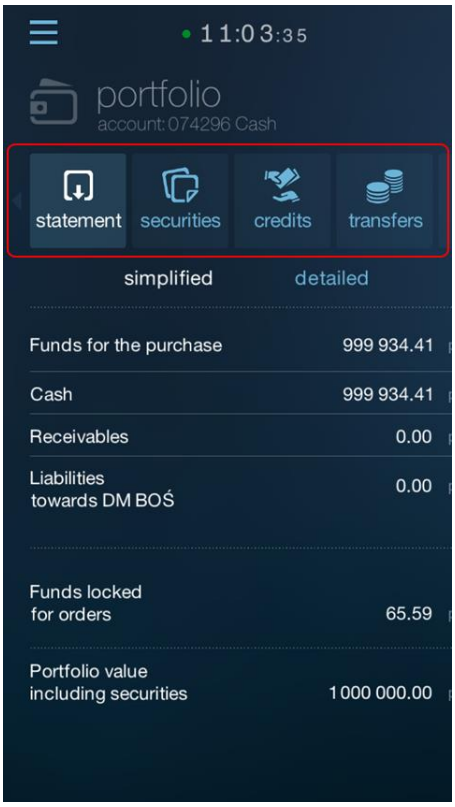
An alternative way to open a window is to expand the main menu , and then select the appropriate item from the **Portfolio** tab.



The portfolio window consists of five internal tabs:

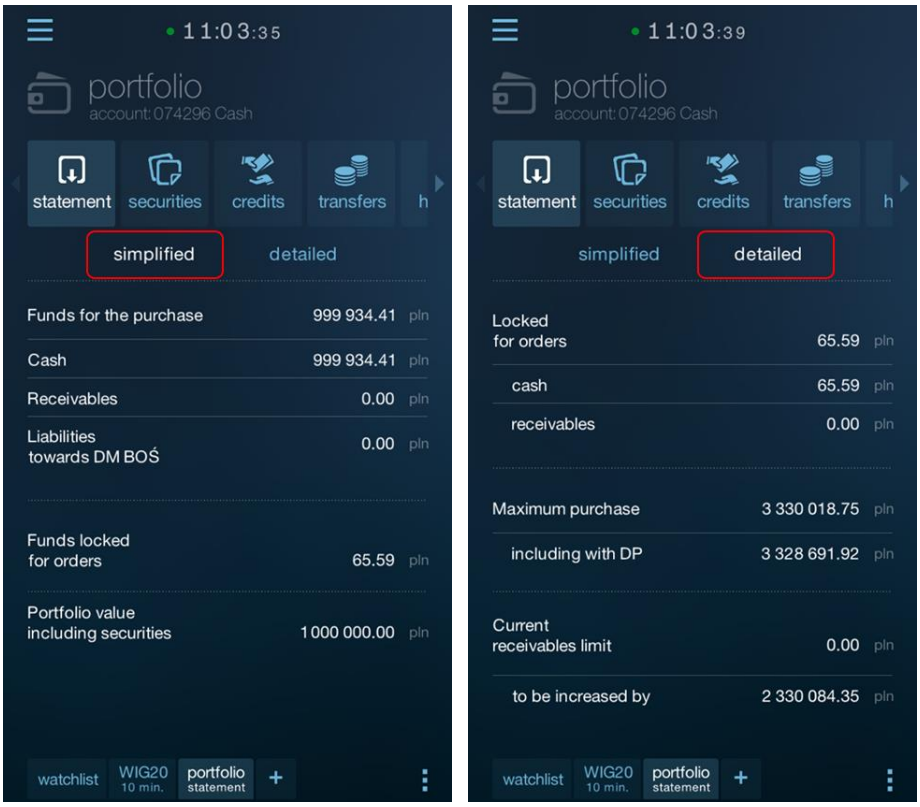
- Current account statement
- Statement of securities held
- Credit line support – the capability to repay or to draw a credit line
- Capability to transfer funds – internal and external transfers
- History of operations

To enable the preview of an applicable tab, select the respective button on the toolbar at the top of the portfolio window:



9.1. Statement

Statement screen shows the status of the funds on the account.
The information are shown in two views: simple and detailed.
You can navigate between views by tapping the appropriate tab.



9.2. Securities

Securities screen shows the amount and value of securities held. The main row (not expanded) optionally shows the number of shares on hold for the order.

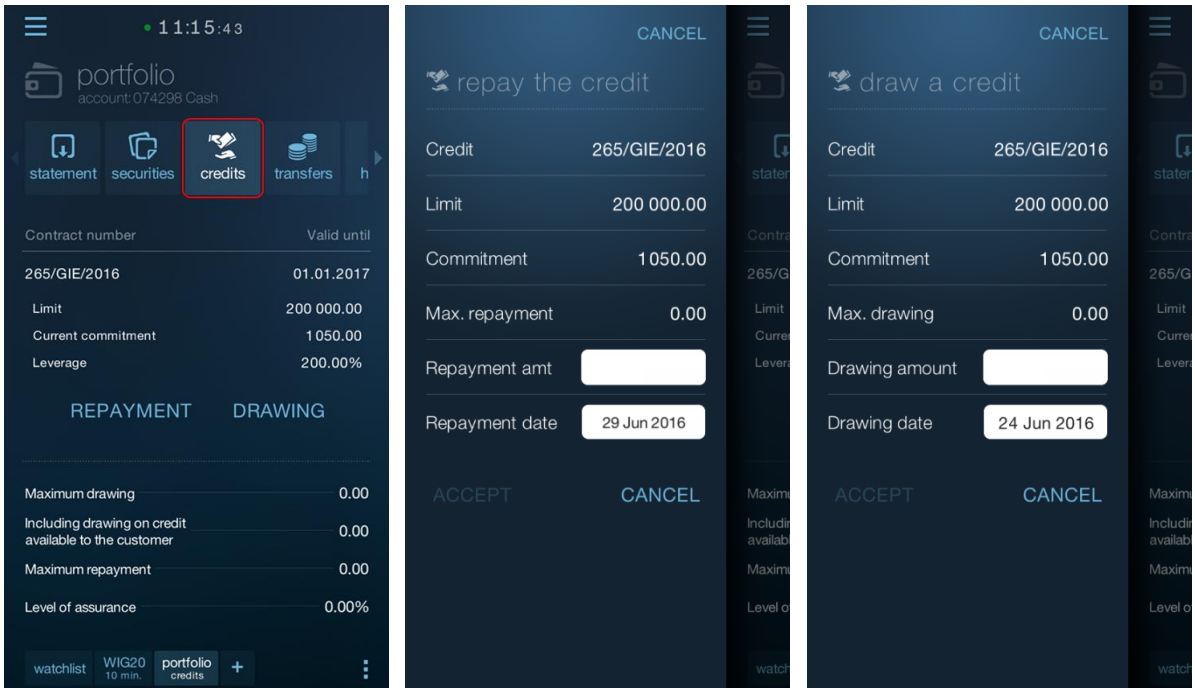
Tap the security row to view the details of the security.
The view allows quick transition to the order form (Buy and Sell buttons)

You can define the rate to convert Profit/Loss of the securities held in application settings (Menu> Settings> Accounts): Reference rate (default) or the Current rate.

9.3. Credits

The application supports the **credit line** available to the customer's account.

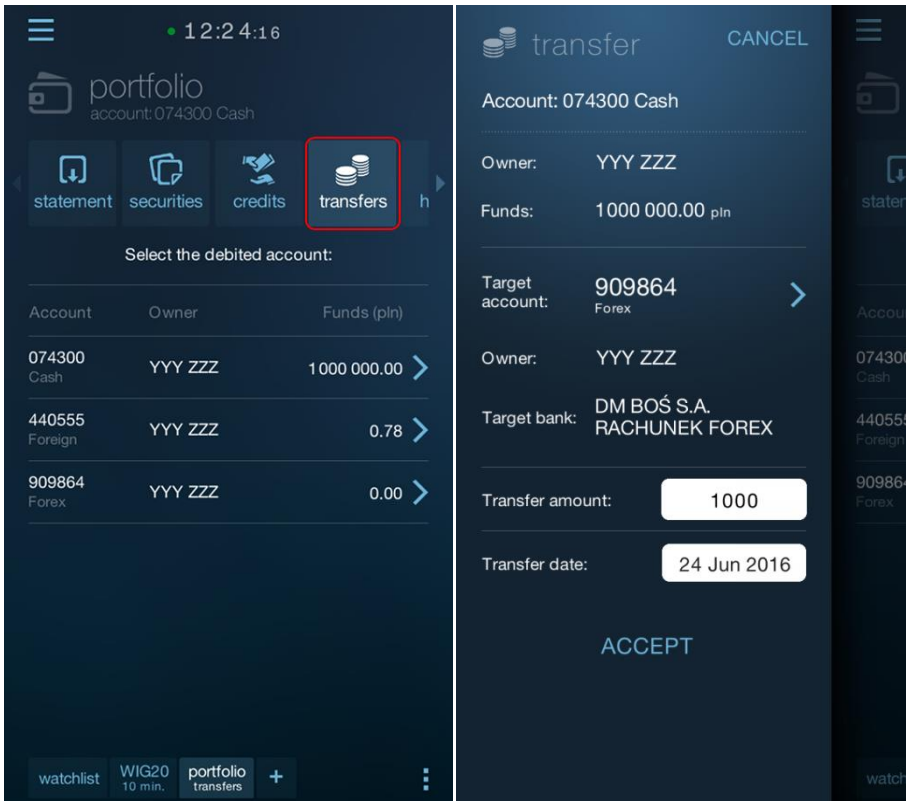
The screen shows, among others, current credit exposure and enables to **replenish the brokerage account** with funds from the credit line and the **repayment of the credit**.



9.4. Transfers

Transfers option enables to send internal and external transfers:

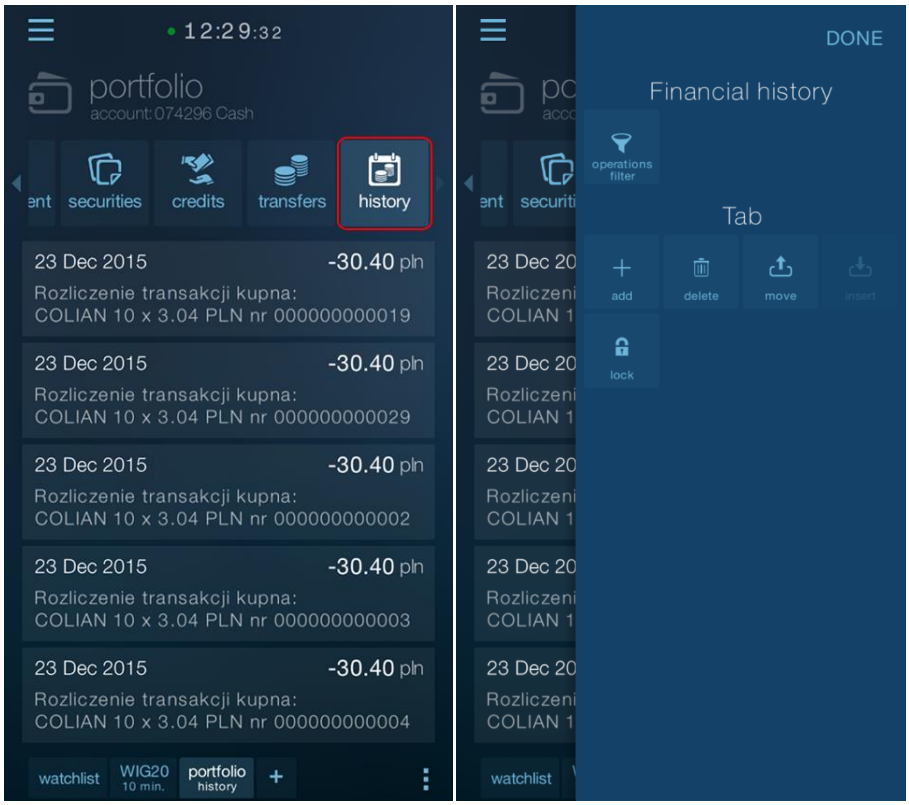
- **Internal transfer** – sending orders for funds transfer between the user's own accounts at broker.
- **External transfer** – sending orders for the transfer of funds from an active account to a defined bank account.

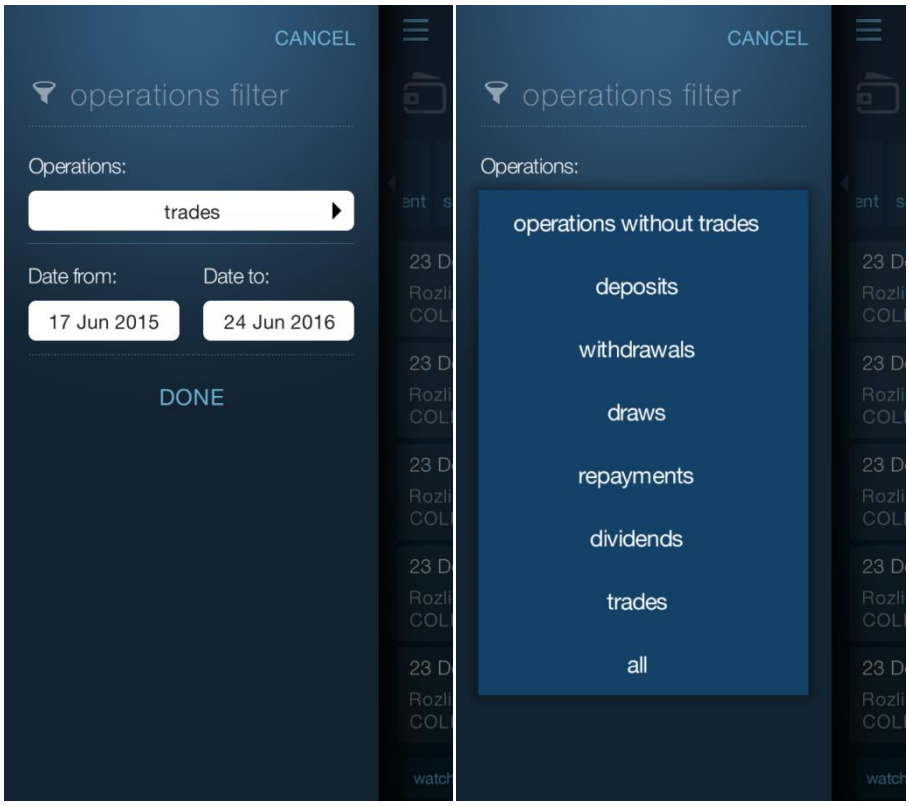


9.5. History of operations

The application provides an overview of the **history of operations** of any kind, performed on the account in the given period of time. You can select the type of operation to be displayed.

You can access the operation **filtering** from the context menu .




CANCEL
operations filter
Operations:
trades
Date from:
Date to:
17 Jun 2015
24 Jun 2016
DONE
CANCEL
operations filter
Operations:
operations without trades
deposits
withdrawals
draws
repayments
dividends
trades
all

10. Orders

The application enables to:

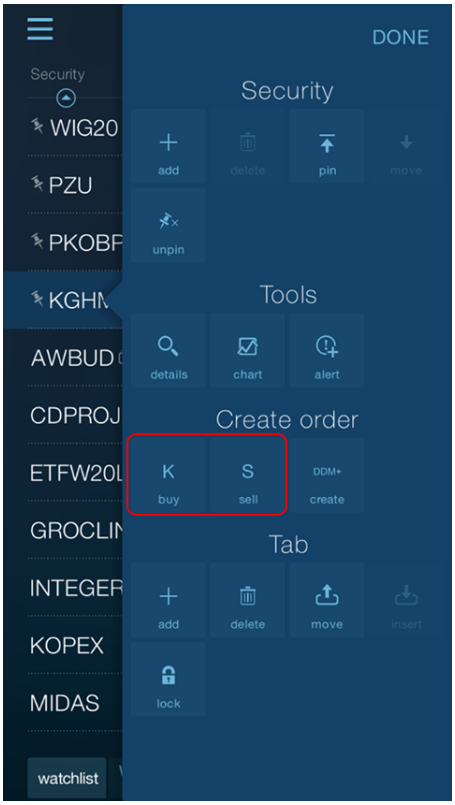
- **Submit orders** for buying and selling on all kinds of customer's investment accounts, including stock or contractual
- **Preview** the details and status of current orders
- **Remove** and **modify** the orders
- Access the complete **history of created orders**

10.1. Creating orders

You can create orders in the application from several levels:

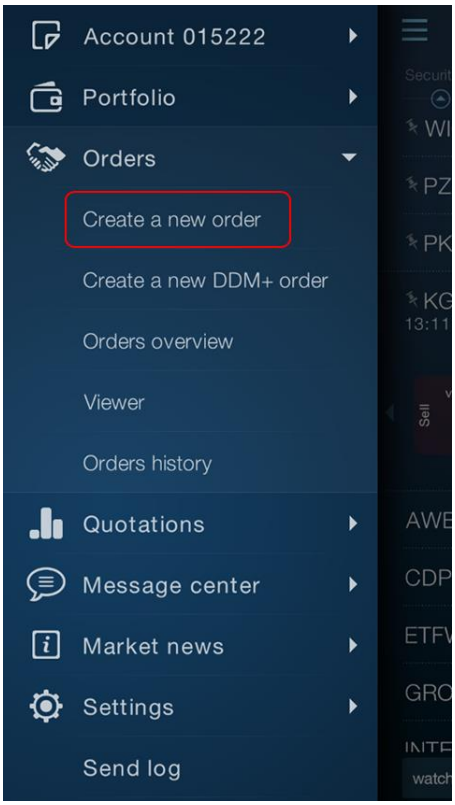
- **From the watchlist**

  - From the table pop-up menu -> Tap and hold the name of the selected stock in the trading screen to place an order – this will display a context menu. Then select the type of order K – Buy, S – Sell. The selection will open the orders form – you can edit the order parameters

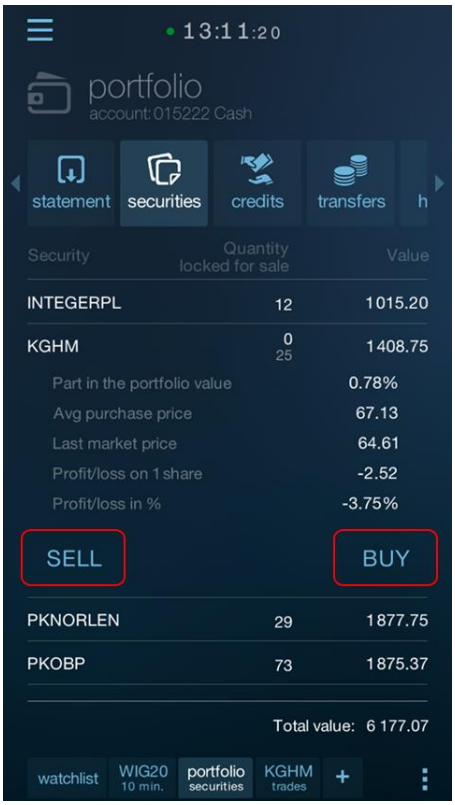


- Buttons in the drop-down table row – tap the applicable button to open the orders form: green-buy or red-sell in the drop-down row of the watchlist.

- **From the main application menu** – Go to the application menu and then select Orders > **Create a new order** tab to place an order

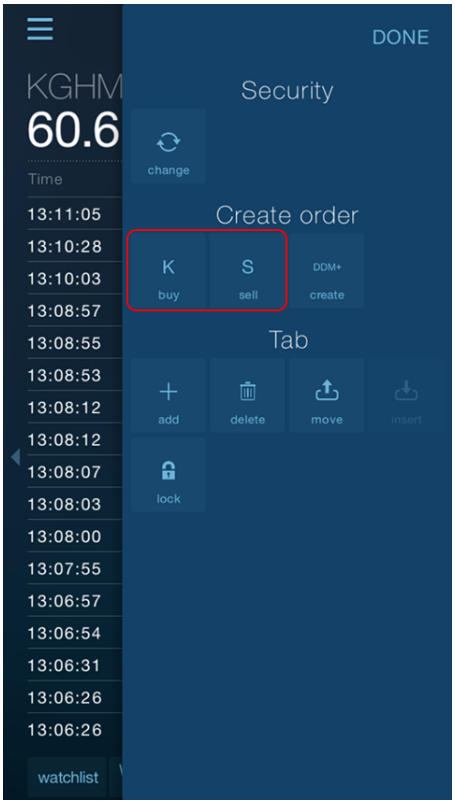


- From the **securities** screen

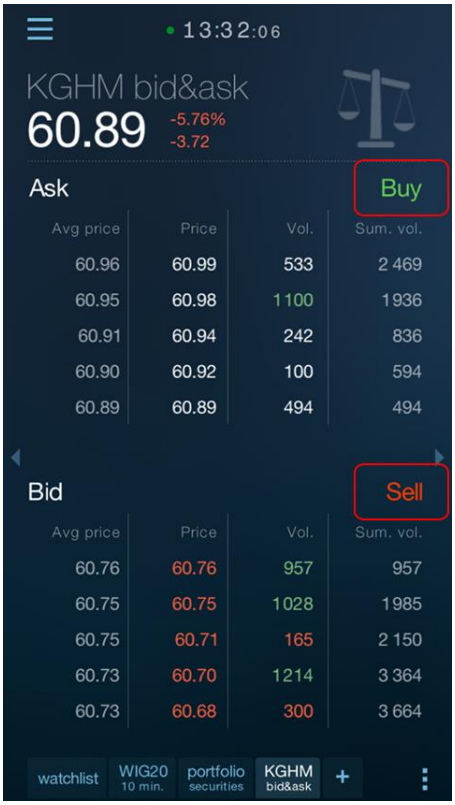


- **From the security details and charts**:

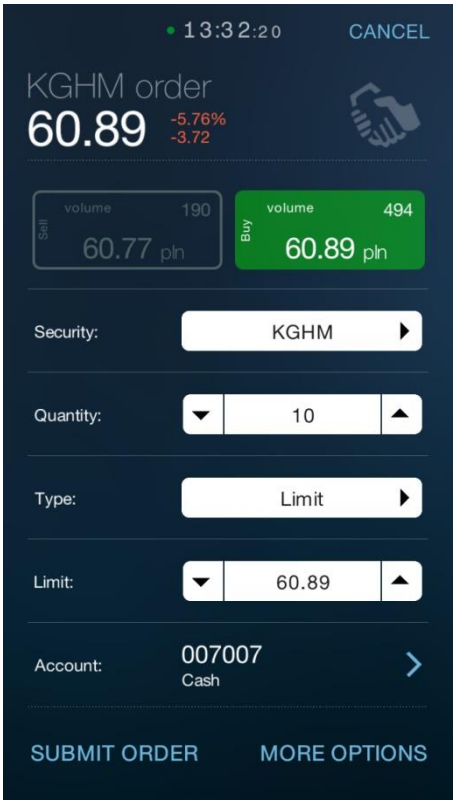
  - From the pop-up menu -> similarly as in the watchlist pop-up menu.



- The Bid&Ask screen -> using dedicated Buy and Sell buttons, as well as after tapping the selected row in the Bid&Ask table (the price of the selected Bid or Ask will be populated in the form by default)

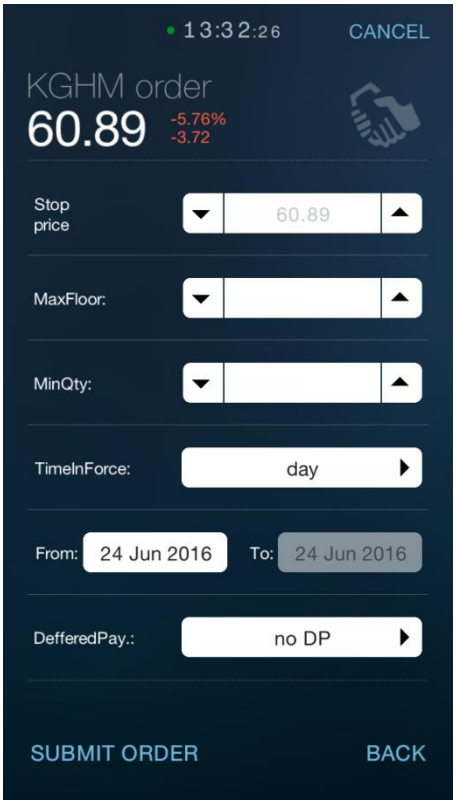


Order form – basic view



Tap **More options** in the lower left corner of the screen to go to the additional order options (stop price, disclosed value, minimum value, order validity or deferred payment).

Order form – additional options view

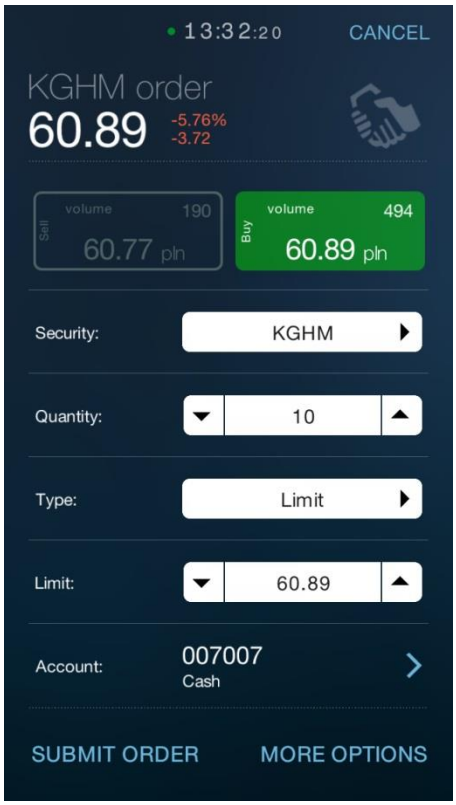


Restore the form's basic view by clicking the **Back** button on the second screen.

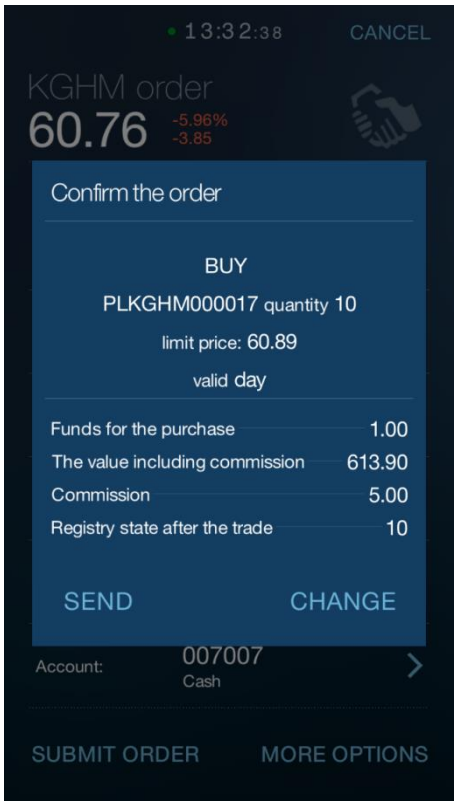
The process of **submitting** an order is carried out in 2 stages:

1. Select the security and fill the order form –> **Submit order**
2. Confirmation the order parameters –> **Send**

1. Submit order



2. Send



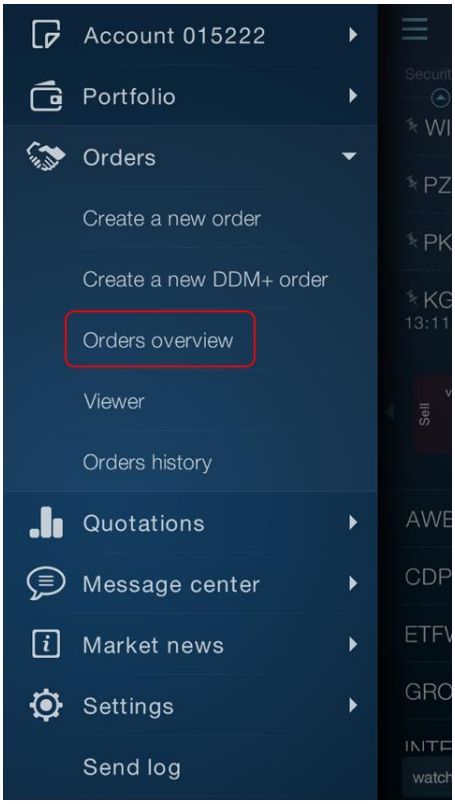
10.2. Orders overview

The application enables to view current and archived orders. You can view current orders from the **Orders overview** window.

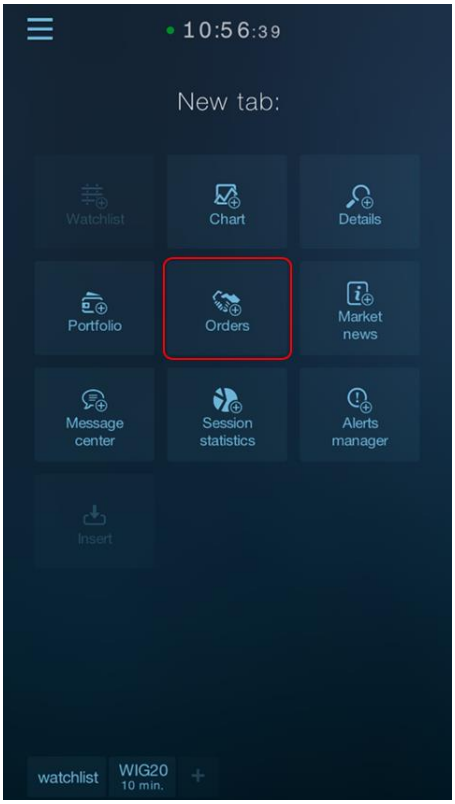
Orders overview window includes two internal tabs: active and archived orders.

You can open the Orders overview window in two ways:

- From the application main menu: **Orders** > **Orders overview**.



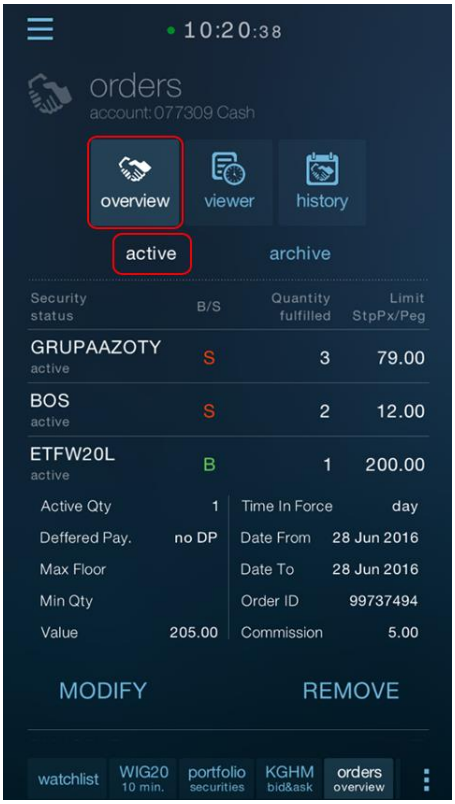
- By adding a new tab: select **Orders** in the screen for adding a new tab. Orders overview is on the first internal tab of the Orders panel.



10.2.1. Active orders

The **Active** tab of the **Orders overview** window contains all active orders, i.e. those that are likely to be executed in the future (i.e., are not completed, partially completed or pending).
You **can modify** or **remove orders** from the active orders overview.

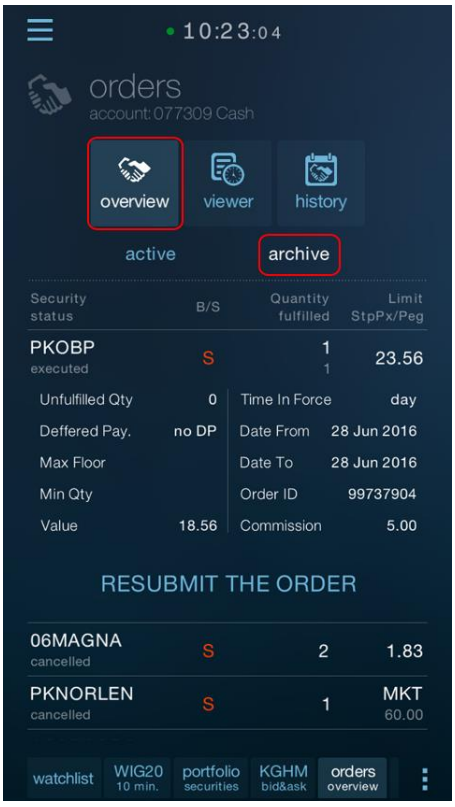
Buttons for modifying or removing are available when you expand the order line (after tapping the order line in the list).



10.2.1. Archive orders

Archive tab of the **Orders overview** window shows the current, but inactive orders; those which changed their status during the current session, but are unlikely to be executed (e.g. were rejected, canceled or executed in full during the current session).
You can **resubmit orders** from the archive orders overview.
Resubmitting an order consists in creating a **new** order with the same parameters as the submitted order.

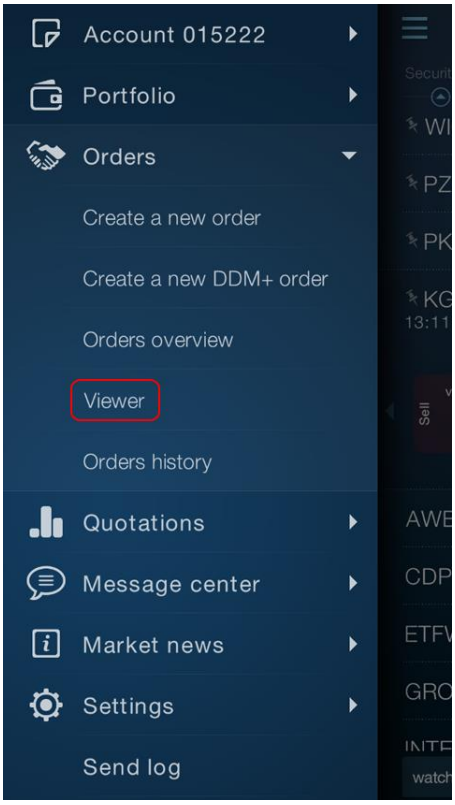
Buttons for resubmitting the order are available when you expand its line (after tapping the order line in the list).



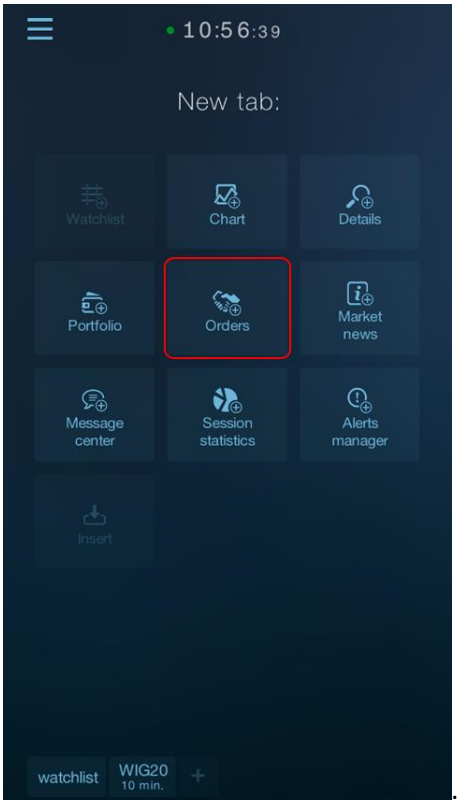
10.3. Viewer

You can open the **Viewer** window in two ways:

- From the application main menu: **Orders** > **Viewer**.



- By adding a new tab -> select **Orders** in the screen for adding a new tab. Viewer is on the second internal tab of the Orders panel



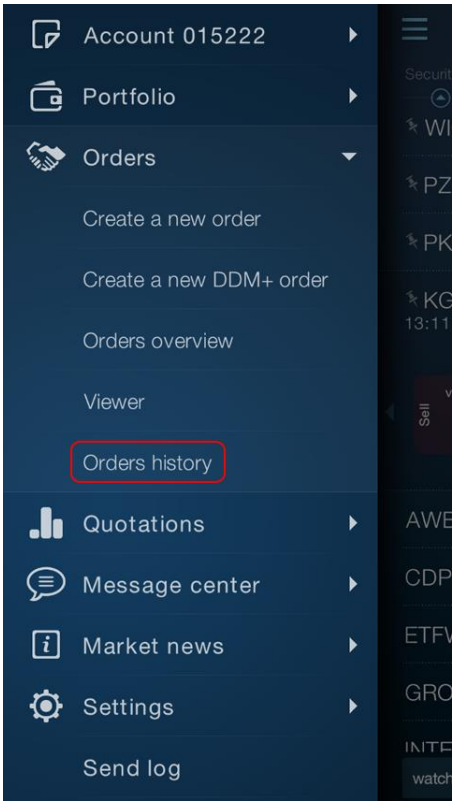
Viewer provides an overview of short messages on the activities and operations on the account, e.g., submission, execution, modification or cancellation of the order or performing a transfer from the account, etc.

10.4. Orders history

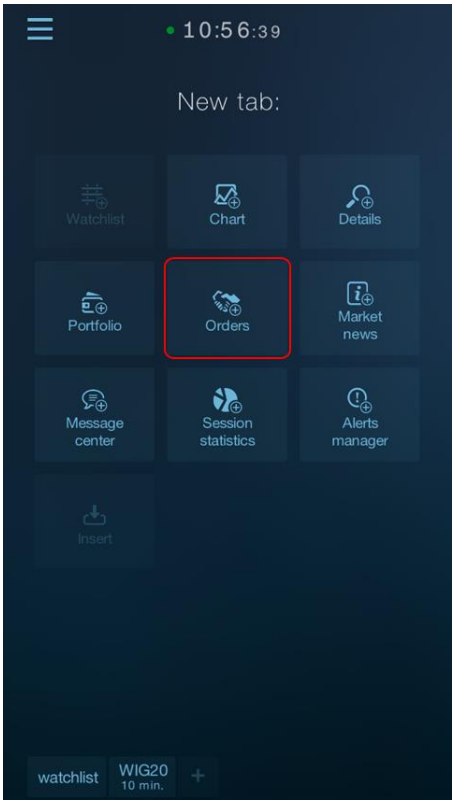
Orders history window provides the preview of any type of order from any time range. The window contains both active and archive orders.

You can open the history of orders window in two ways:

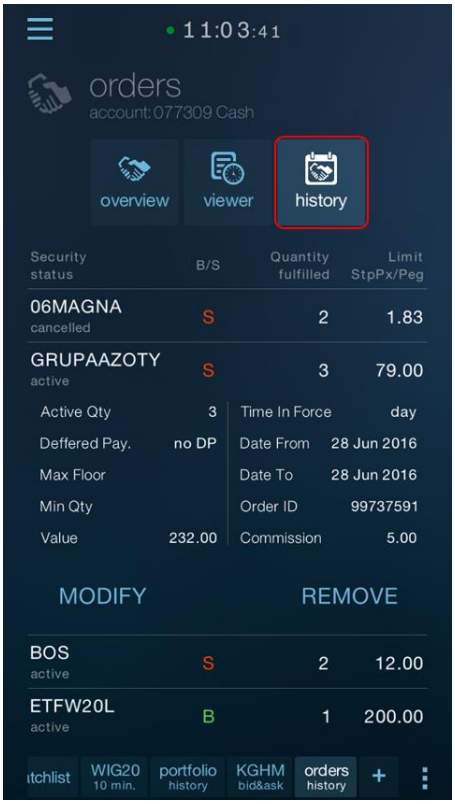
- From the application main menu: **Orders** > O**rders history**.



- By adding a new tab: select **Orders** in the screen for adding a new tab. History of orders is on the third internal tab of the Orders panel.

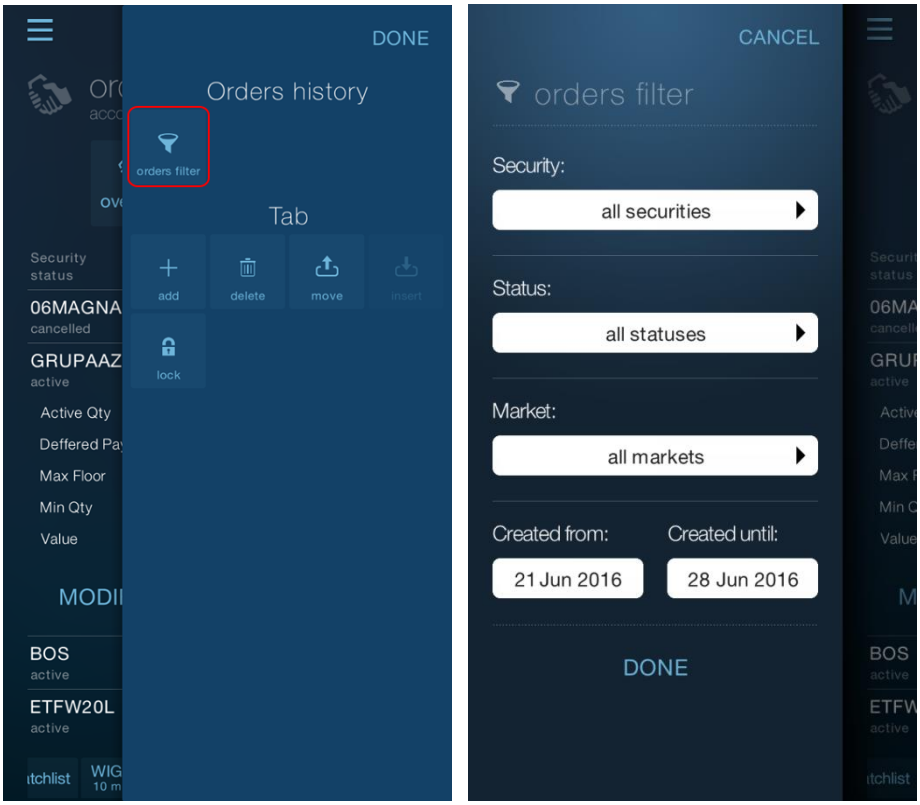


As with the Orders overview window, **Modify** and **Remove** (for active orders) or **Resubmit the order** (for inactive orders) buttons appear in the expanded order line.



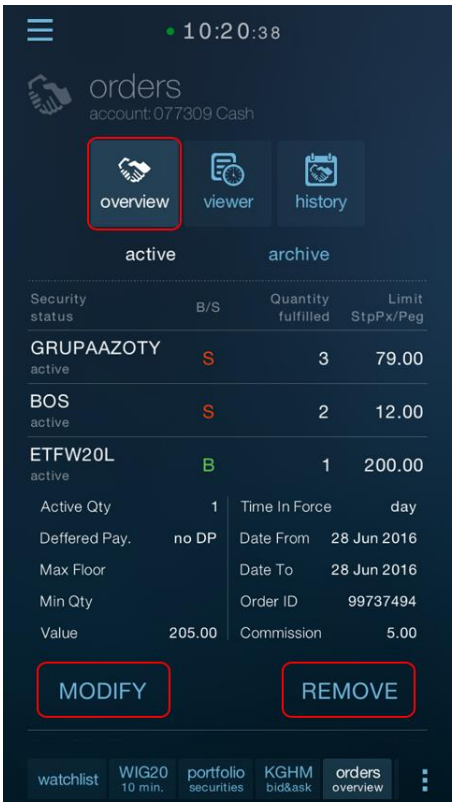
You can select the type of order to be displayed. You can **filter** by security name, market, order status, and time range.

You can access the operation filtering from the context menu .



10.5. Modifying and canceling of orders

You can modify or remove the orders from the **Orders overview** and **History of orders** windows. Buttons for modifying or removing are available when you expand the order line (after tapping the order line in the list).



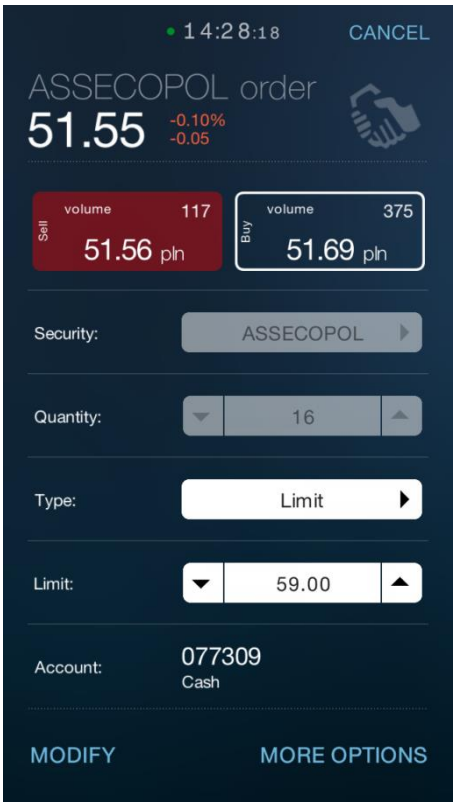
You can modify or cancel only **active orders**, that is, those that are likely to be executed in the future (i.e., are not completed, partially completed or pending).

For inactive orders the only available option is to resubmit the order, i.e., issue a new order with the same parameters.

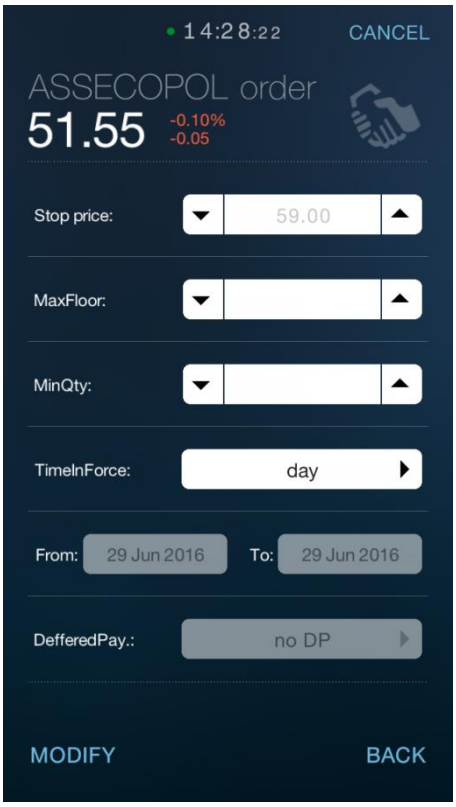
10.5.1. Modifying the order

When you click the **Modify** button in the order line, a modification form will open, which is the same in its design as the form for submitting a new order. However, the fields which cannot be modified (e.g. security, order side, number, etc.) are locked.

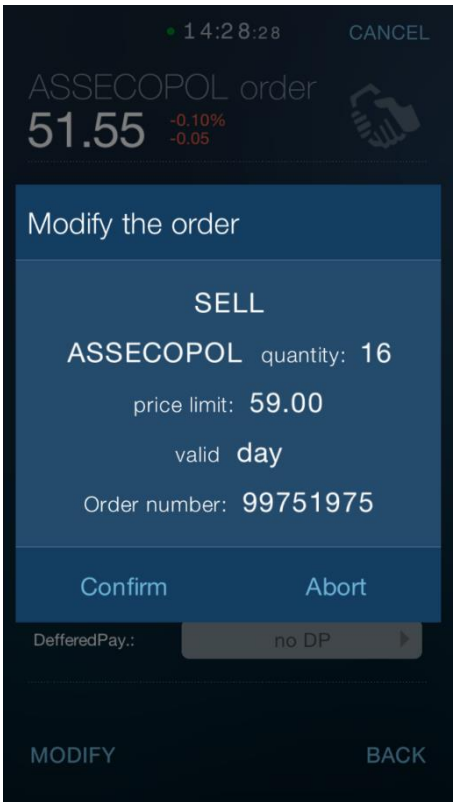
Modification form – basic view



Modification form – additional options view

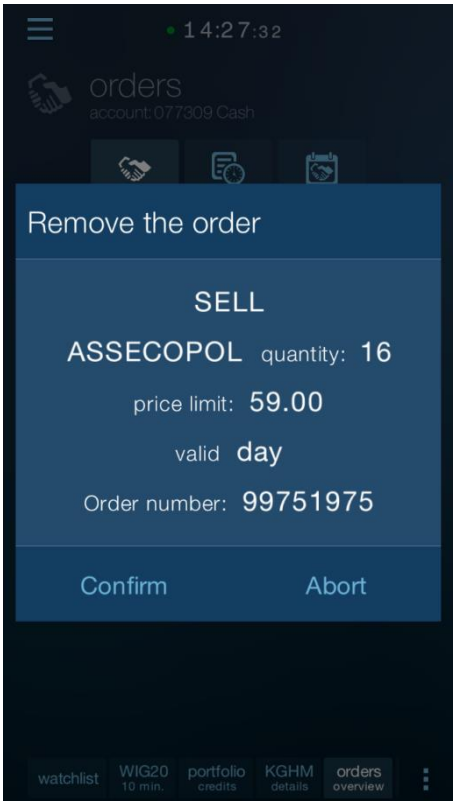


After setting the new order parameters in the format, click the **Modify** button in the lower left corner of the form, and then approve the changes in the displayed message:



10.5.2. Removing the order

When you click the **Cancel** button in the order line, you will be asked for confirmation of the cancellation of the order in the pop-up message. You can also cancel the cancellation of the order.



10.6. DDM+ orders

In addition to standard stock exchange orders the application allows placing DDM+ orders.

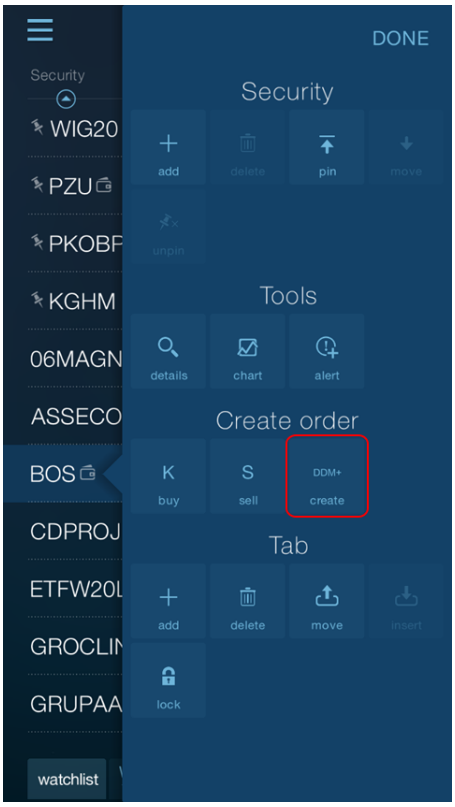
The following DDM+ orders offered by broker are available in the application:

- **Stop** (stop loss).
  A single order, which activates after a specified price occurs.
- **Trailing Stop**.
  A single STOP order in which the activation price moves in the case of a favorable change in the market price of the security.
- **OTO** – One Triggers Other
  Two orders, the first of which is the main order and the second is a sub-order. Execution of the main order activates the sub-order.
- **OCO** – One Cancels Other
  Three orders, the first of which is the main order and the subsequent two are sub-orders (Take Profit and Stop Loss). The execution of the main order causes the conditional activation of two sub-orders, of which the executed one will be the one which first meets the activation condition.
- **ORO** – One or Other
  Two conditional orders (Take profit and Stop Loss), of which the executed one will be the one which first meets the activation condition.

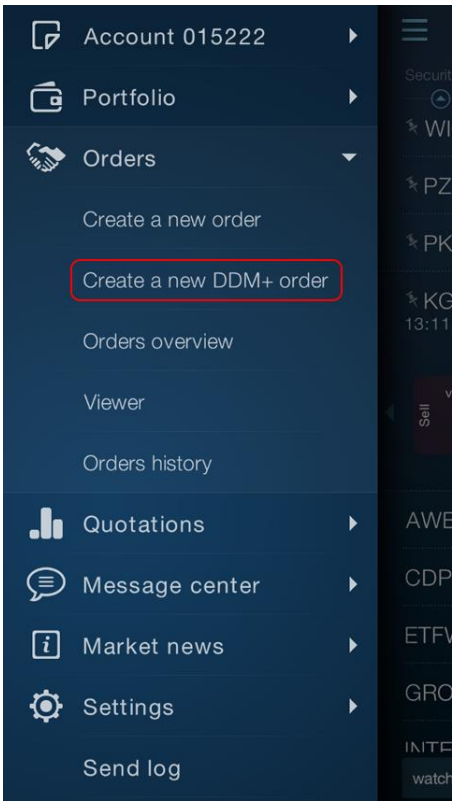
10.6.1. Creating DDM+ orders

You can create DDM+ orders in the application from several levels:

- **From the table pop-up menu** -> Tap and hold the name of the selected stock in the trading screen to create an order – this will display a context menu. Then select the **Create DDM+** button.

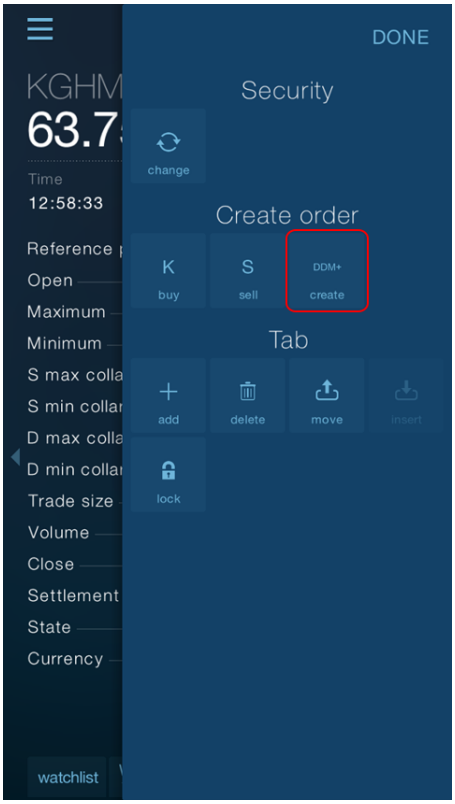


- **From the main application menu** – Go to the application menu and then select **Orders** > **Create a new DDM+ order** tab to place an order



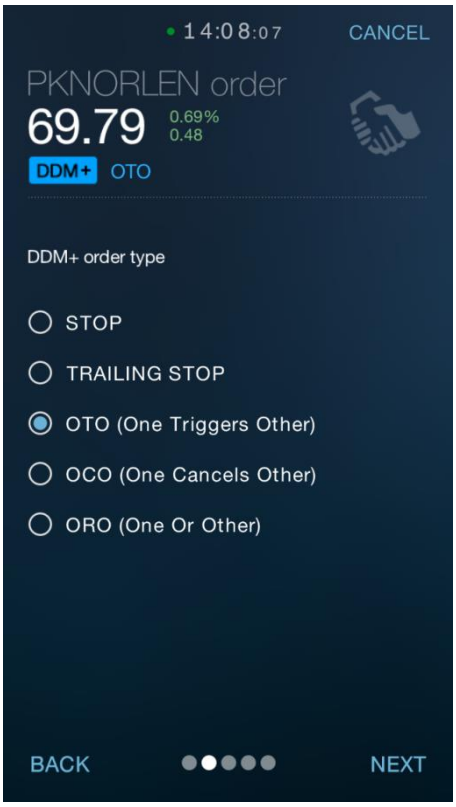
- **From the pop-up menu of the security details or chart screen**

  Similarly as in the watchlist pop-up menu -> by clicking on the **Create DDM+** button

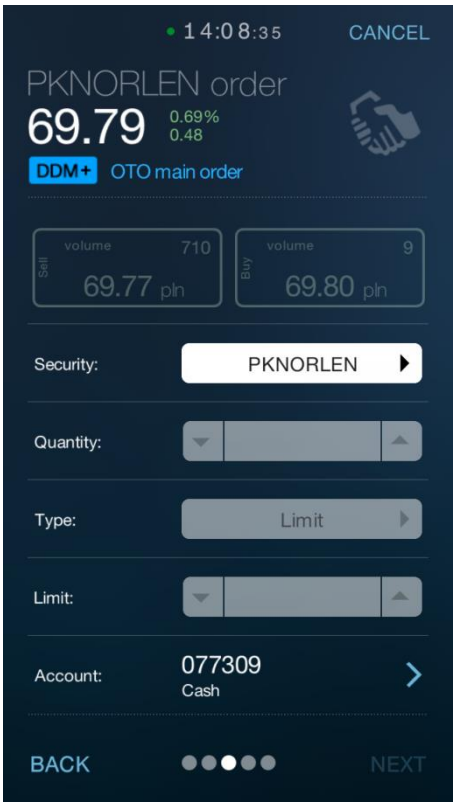


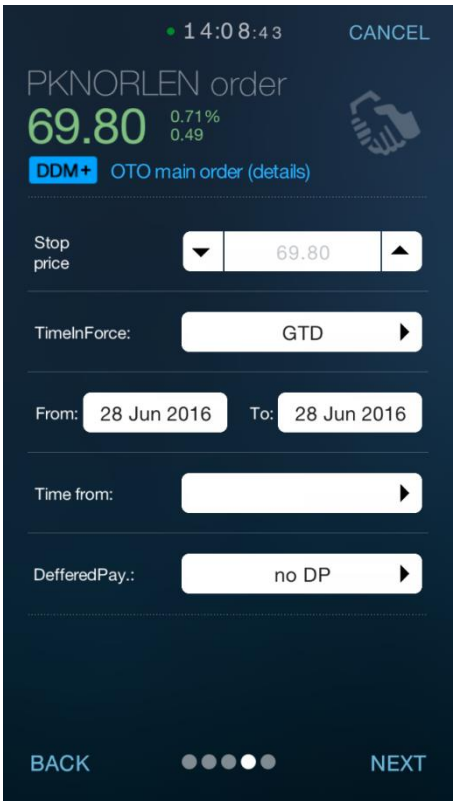
To create a DDM+ order, use a wizard consisting of several steps:

1. **Select security**
   When you use the **Create a new DDM+ order** command in the main menu, the security selection screen is displayed first.
   If you call the **Create DDM+** option from the watchlist or details screen, the security will be automatically populated, and you will be immediately moved to step 2.
2. **Selecting the type of DDM+ order**
   After selecting the security, you select the type of DDM+ order:



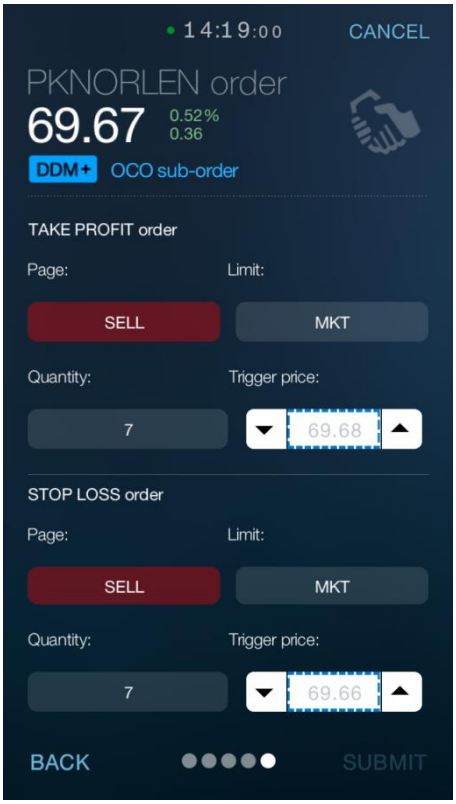
3. **Determining the parameters of order(s)**
   Depending on the type of DDM+ order, order parameters are located on two (STOP orders and Trailing Stop), or three (OTO, OCO, and ORO orders) consecutive screens.
   After selecting the order type, you should specify its direction and basic parameters the main DDM+ order.



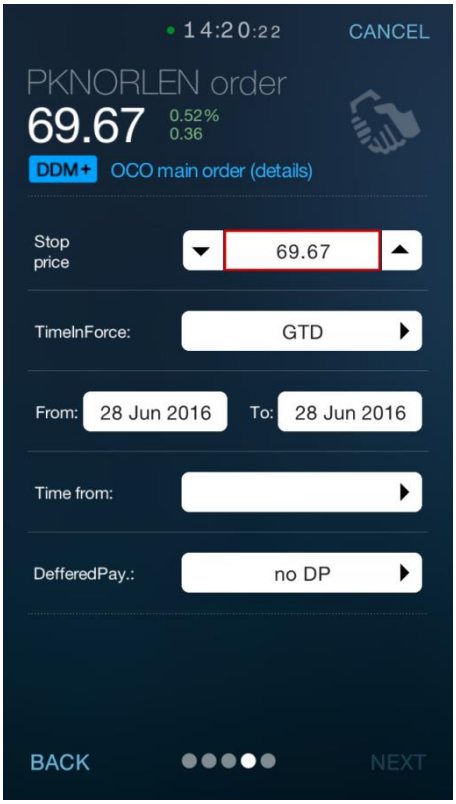


Fill in the order(s) parameters on the subsequent screens depending on the type of DDM+ order. Some of them also contain sub-orders in addition to the main order. You define the sub-order parameters in the next step.

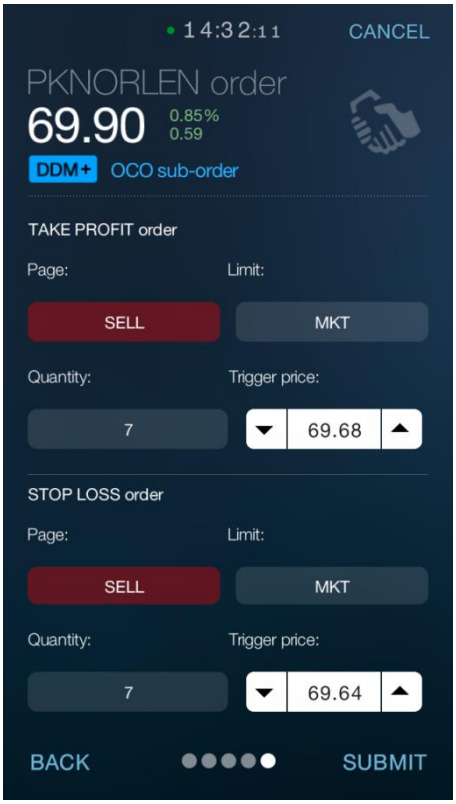
For convenience, the application marks mandatory order fields with a blue dashed line. The other parameters of the order are optional.

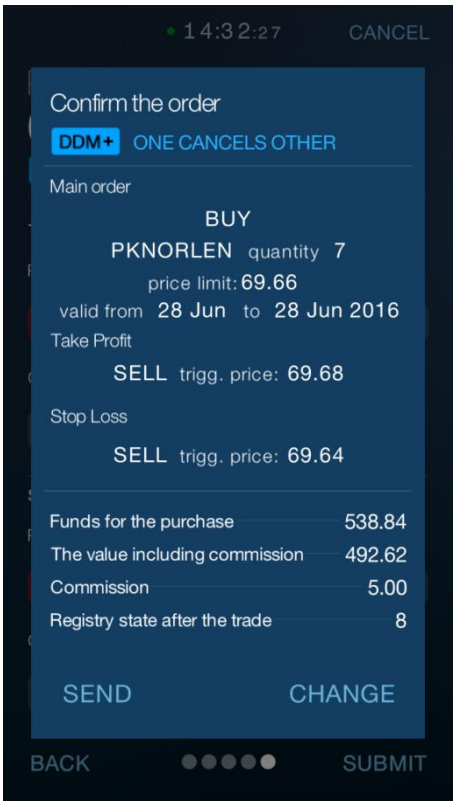


The application also controls the relationship between the activation price, the activation limit, and the order limit. The field which is filled incorrectly is marked in red.



4. **Submit an order and confirm (Send)**
   In the final step of the DDM+ order wizard, **Submit** option appears in the lower right corner of the screen. When you click on it, the window containing the summary of parameters of the submitted order appears.



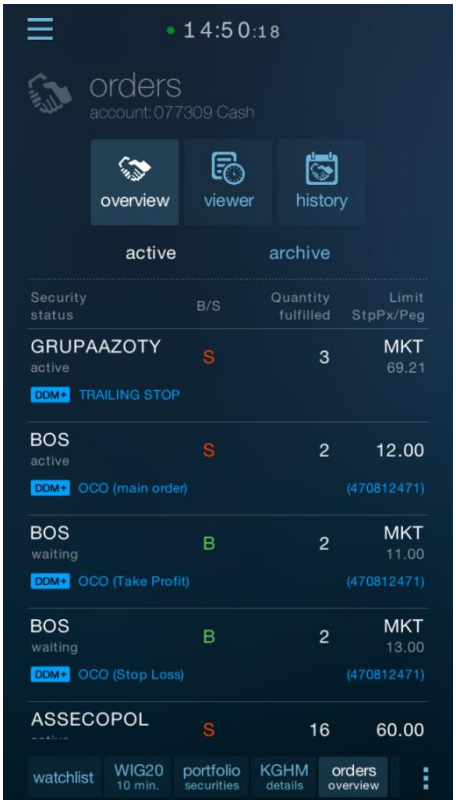

14:32:27
CANCEL
Confirm the order
DDM+
ONE CANCELS OTHER
Main order
BUY
PKNORLEN quantity 7
price limit: 69.66
valid from 28 Jun to 28 Jun 2016
Take Profit
SELL trigg. price: 69.68
Stop Loss
SELL trigg. price: 69.64
Funds for the purchase 538.84
The value including commission 492.62
Commission 5.00
Registry state after the trade 8
SEND
CHANGE
BACK
SUBMIT

10.6.2. DDM+ orders on the orders list

DDM+ orders, after submitting, will also be displayed in **Orders overview** and **Orders history** windows.

DDM+ orders are marked with a blue label indicating the type of the DDM+ order.
In the case of DDM+ containing more than one order (OTO, OCO, ORO), individual main orders and sub-orders will be listed as separate items.

DDM+ orders, which consist of the main order and sub-orders, are marked with an additional **main order number**, which is visible in the header (in blue).

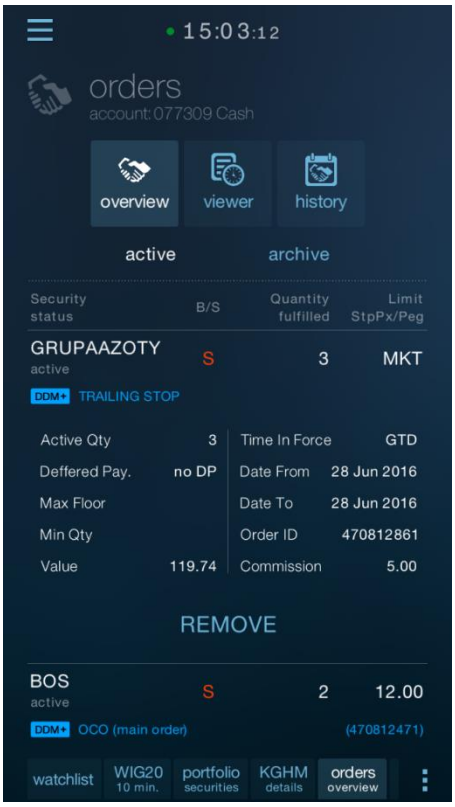


To see the order details, simply tap the order line (similarly, just tap the order line to collapse the details view).

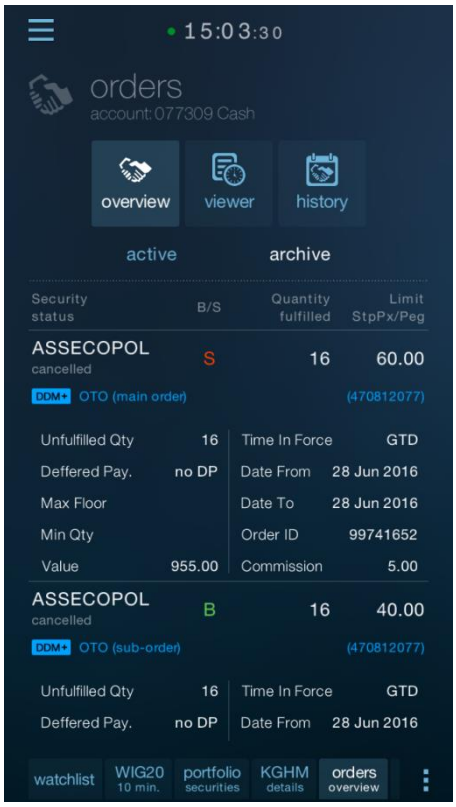
Note!
The only available option in the detail view of **active** DDM+ orders is **Remove**. You cannot modify DDM+ orders.
Removing the main order cancels the entire order (including sub-orders). Similarly, the opposite – removing the sub-order cancels all orders in the group (including the main order).

There is no additional option in the details view of **inactive** DDM+ orders (it is not possible to **resubmit** the order). The order in the list is for informational purposes only.

DDM+ orders – active



DDM+ orders – inactive



10.7. Order templates

The application enables to set the order template – separately for Shares and Derivatives.
Order templates allow for automatic calculation of the order volume according to the method specified in settings.
Templates take into account the value of commission and the surplus for MKT orders

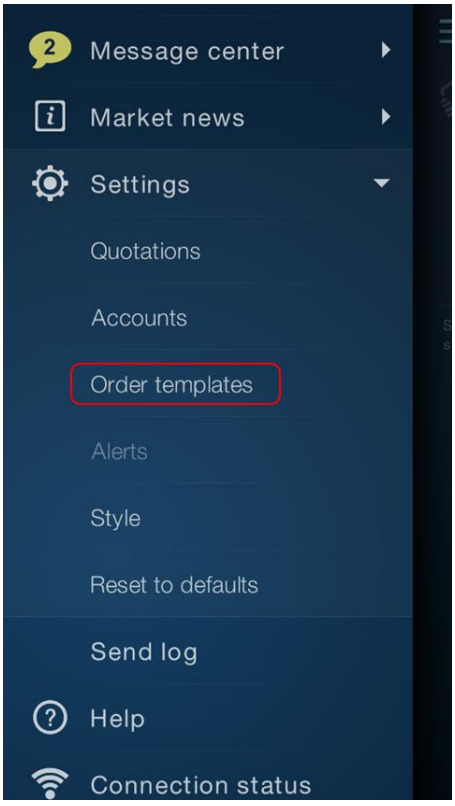
Order templates for Stocks – available options:

- **Account balance** – for Buy orders it calculates the order value for the entire balance of available funds for the purchase; for Sell orders it sells all owned securities.
- **Max. value of the order** – creates the order value which is not higher than the value specified in the template (including commissions).
- **Quantity from the offer** (with the balance priority for the sale) – for Buy orders, the quantity is populated from the selected Ask offer (the amount of securities without regard to the available balance), and for Sell orders the quantity is populated from Bid offer, up to the amount of the available balance of owned securities.

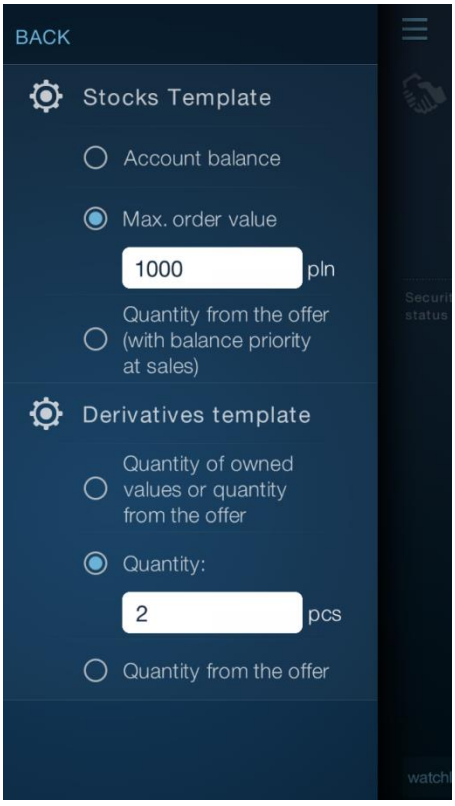
Order templates for Derivatives – available options:

- **Quantity of owned position or the amount from the offer** – creates an order for the quantity from the Bid or Ask offer, or amount of owned opened position.
- **Quantity** – creates an order for a defined number of securities.
- **Quantity from the offer** – creates an order for the quantity from the Bid or Ask offer.

Order templates – settings



Order templates – available options



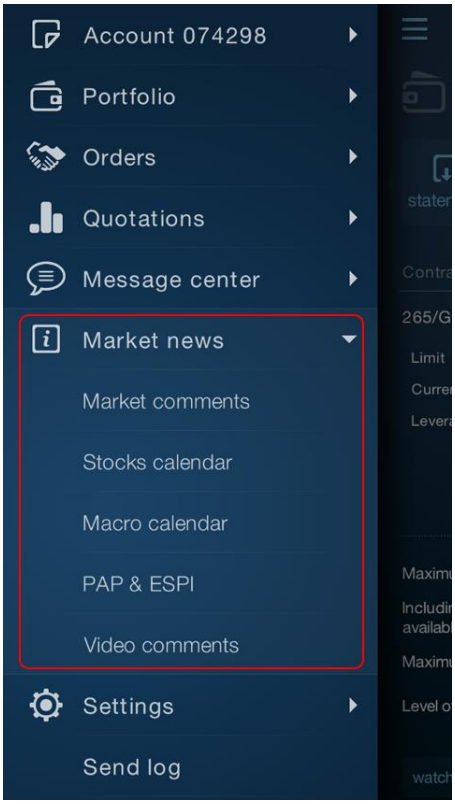
11. Market news

Market news in the application consist of 5 screens:

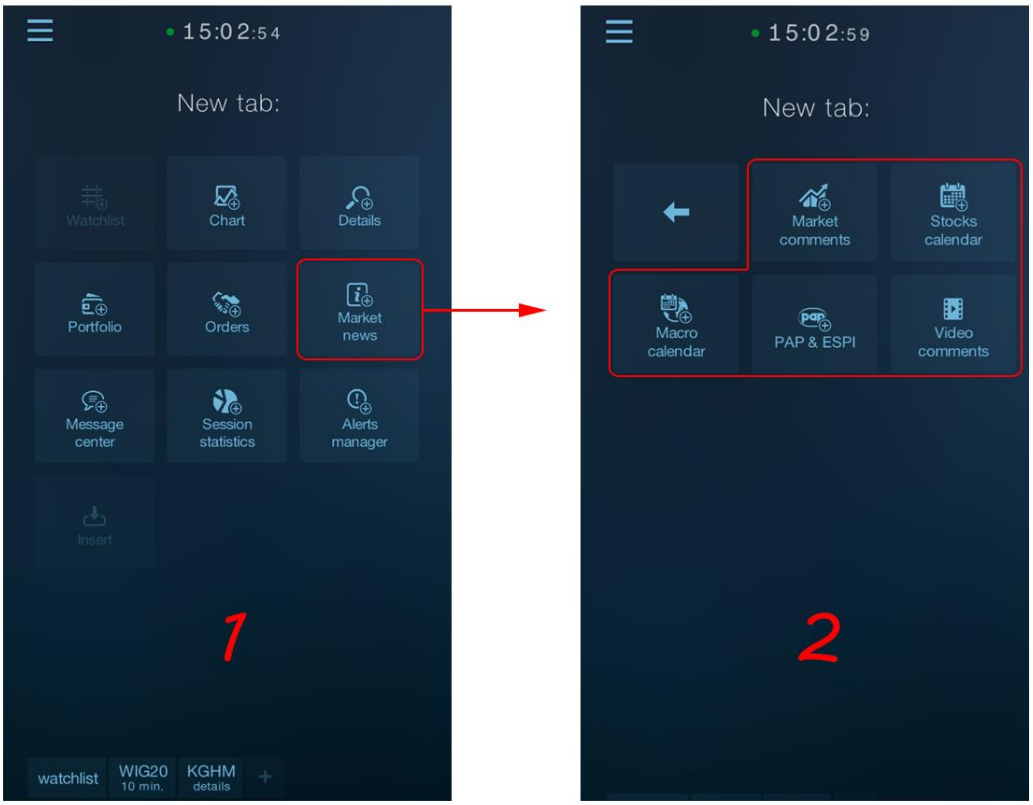
1. Market comments
2. Stocks calendar
3. Macro calendar
4. PAP and ESPI messages
5. Video comments

You can open the Market news window in two ways:

- From the application main menu: by selecting the appropriate item from the **Market news** tab.



- By adding a new tab: select **Market news** in the screen for adding a new tab, and then select the appropriate news type on the next screen



11.1. Market comments

The application makes it easy to **access comments and analyzes** published by broker. In addition to viewing the comments, the application enables to open the attached PDF files (with the analyses). You can retrieve entries from previous days (using the “Get More” option at the bottom of the list).

Market comments – comments list view

Market comments – comment details view

Market comments screen also includes comments after the session published by broker analysts that contain the summary of the most important events on the finished trading session.

After- session comments are marked with the icon on the list.

Market comments also display a brief information about the publication of key macroeconomic data.

They are then marked with icon.

11.2. Stocks calendar

The application enables to preview the stock exchange calendar with major events in domestic (listed on the Warsaw Stock Exchange and New Connect) and foreign stocks, for the selected day.

In addition, the stock from the user portfolio are marked with graphics .

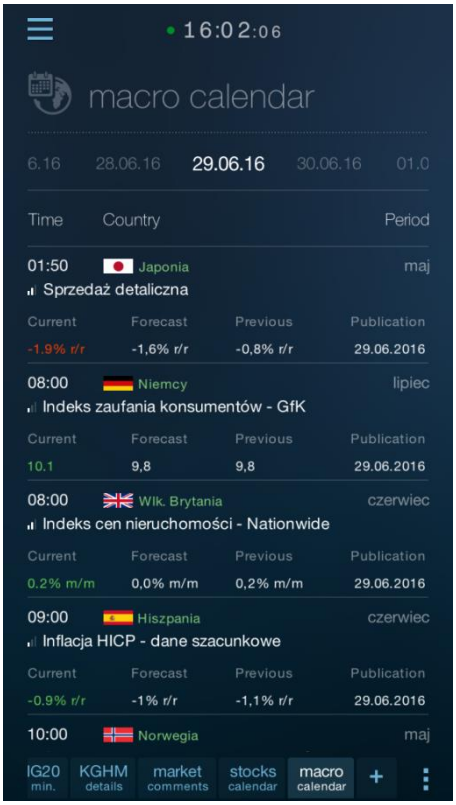
11.3. Macro calendar

The application enables to preview the macroeconomic calendar showing the archive readings and forecasts in addition to the current readings and forecasts.

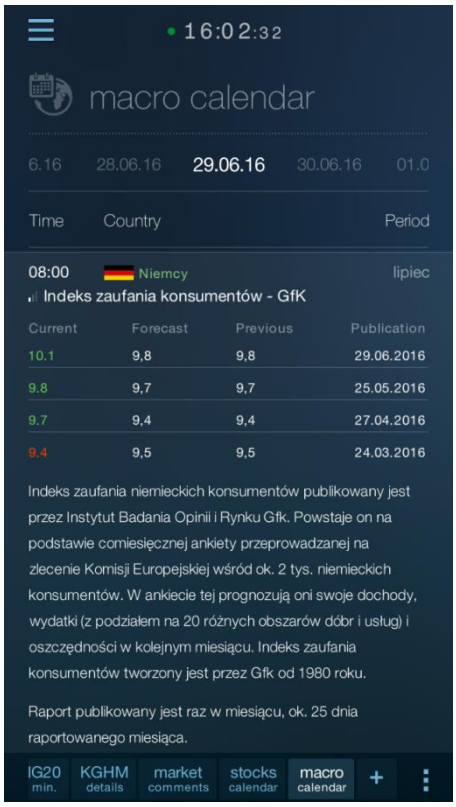
Current readings are colored in accordance with the direction of changes as compared to the forecast:
- green -> rise, blue -> no change, red -> fall as compared to the forecast.

The expanded calendar entry line also contains archive data in the form of a chart and the description of selected macroeconomic indicators.

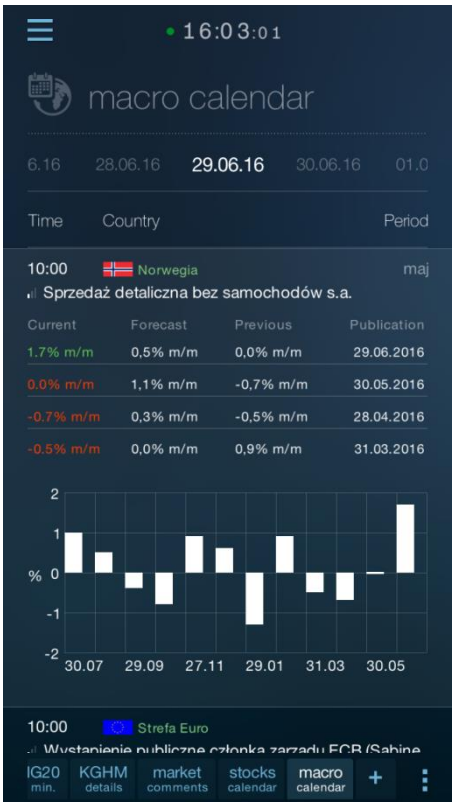
Macro calendar – list view



Macro calendar – details (variant I)



Macro calendar – details (variant II)



11.4. PAP and ESPI messages

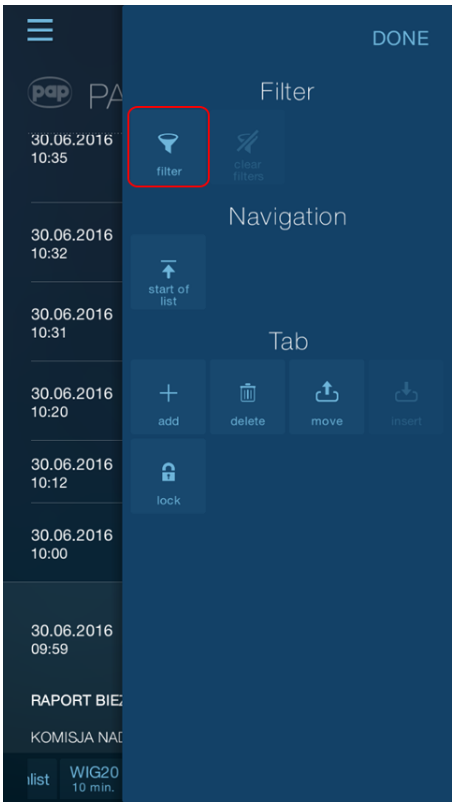
The application provides the access to Polish Press Agency (PAP) comments in the field of Economics and Finance, as well as ESPI messages containing current and periodic reports of stock listed on the WSE.

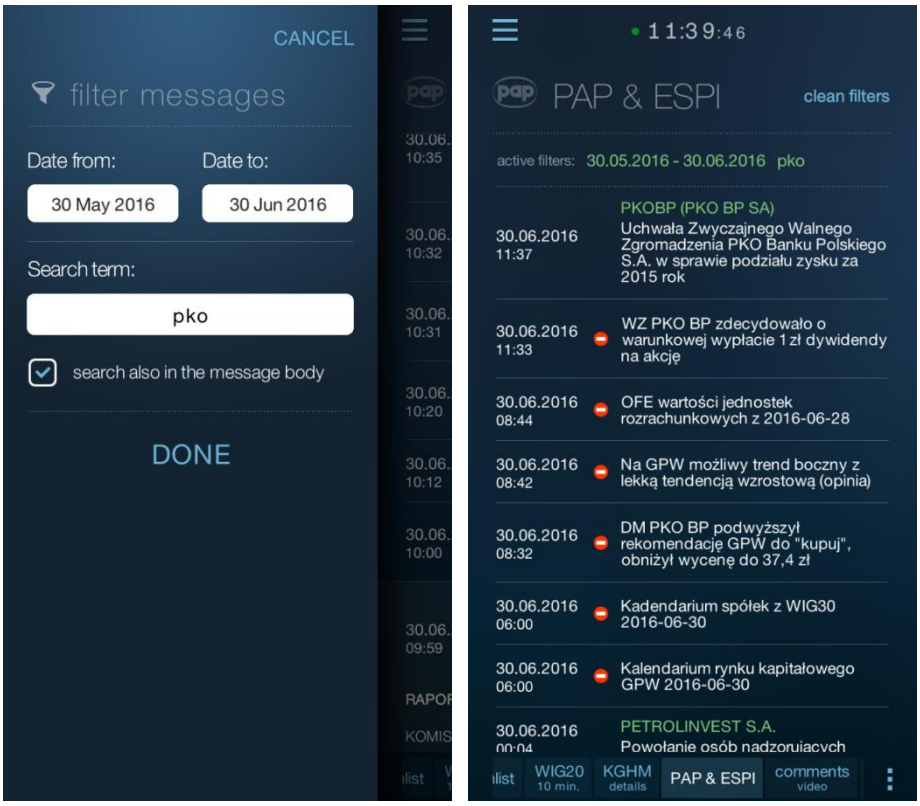
ESPI messages are highlighted in the list by highlighting the name of the reported stock company in the subject (using a different color).

Other messages (without highlighting the security name) are PAP messages.

By default, the PAP and ESPI screen shows all messages on the current day. However, you can filter messages by date range, as well as a keyword contained in the subject line or the entire content of the message.

You can access the message **filtering** from the context menu or a direct link in the screen header.




CANCEL
filter messages
Date from:
Date to:
30 May 2016
30 Jun 2016
Search term:
pko
search also in the message body
DONE
11:39:46
PAP & ESPI
clean filters
active filters: 30.05.2016 - 30.06.2016 pko
PKOBP (PKO BP SA)
30.06.2016 11:37
Uchwała Zwyczajnego Walnego Zgromadzenia PKO Banku Polskiego S.A. w sprawie podziału zysku za 2015 rok
30.06.2016 11:33
WZ PKO BP zdecydowało o warunkowej wypłacie 1 zł dywidendy na akcję
30.06.2016 08:44
OFE wartości jednostek rozrachunkowych z 2016-06-28
30.06.2016 08:42
Na GPW możliwy trend boczny z lekką tendencją wzrostową (opinia)
30.06.2016 08:32
DM PKO BP podwyższył rekomendację GPW do "kupuj", obniżył wycenę do 37,4 zł
30.06.2016 06:00
Kadendarium spółek z WIG30 2016-06-30
30.06.2016 06:00
Kalendarium rynku kapitałowego GPW 2016-06-30
30.06.2016
PETROLINVEST S.A.
Powołanie osób nadzorujących
WIG20 10 min.
KGHM details
PAP & ESPI
comments video

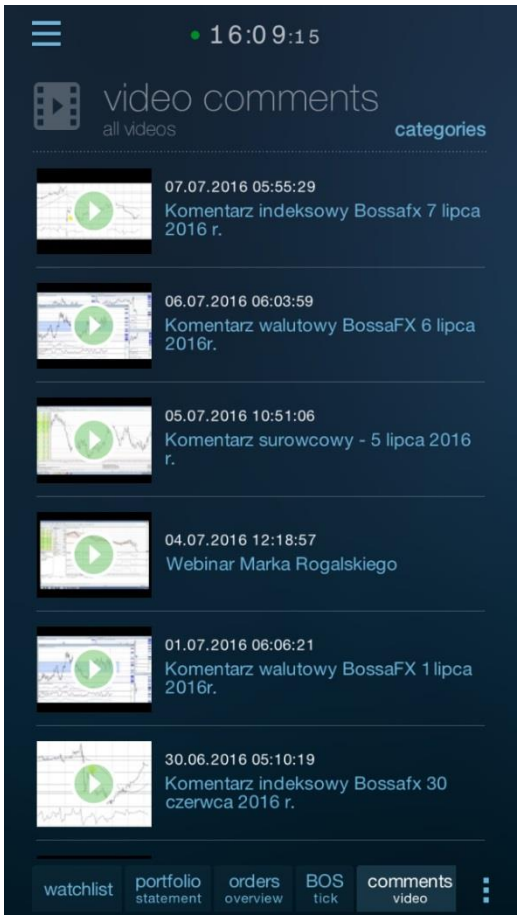
11.5. Video comments

Video comments screen provides access to video files published by the analysts and broker. The videos published include mainly the analyses of the current situation on individual markets (with live comment from the analyst), as well as educational videos (on investment techniques).

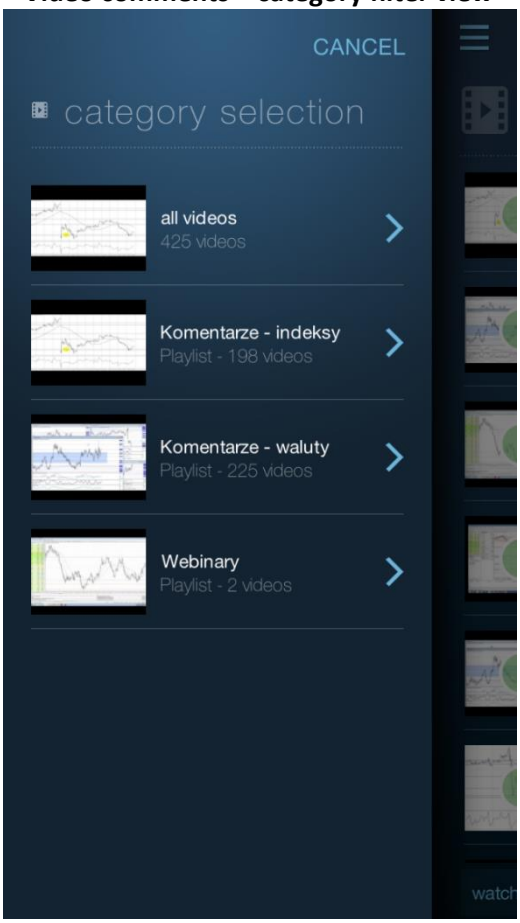
By default, the screen loads the specified amount of the most recent video files, but you can limit the list of videos to a particular category.

You can access the **category filtering** from the context menu or a direct link in the screen header.

Video comments – list view



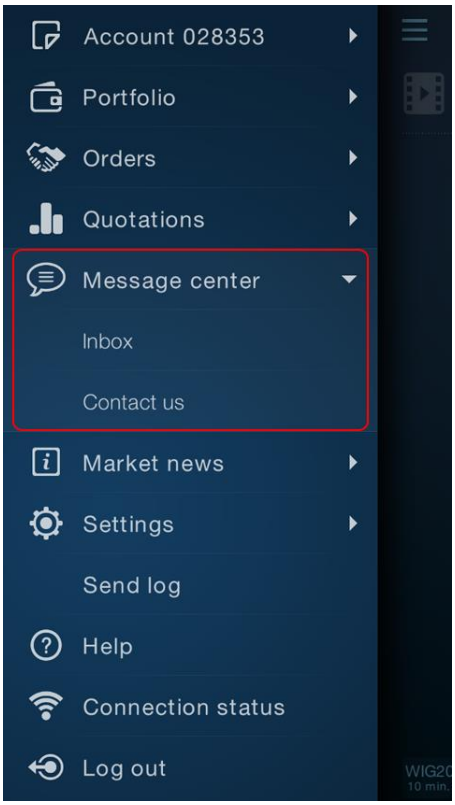
Video comments – category filter view



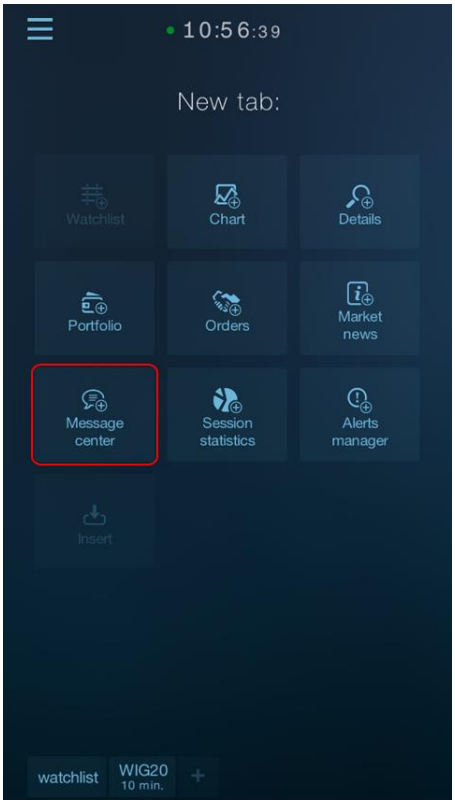
12. Message center

You can open the Message center window in two ways:

- From the application main menu icon: by selecting the appropriate item from the **Message center** tab.



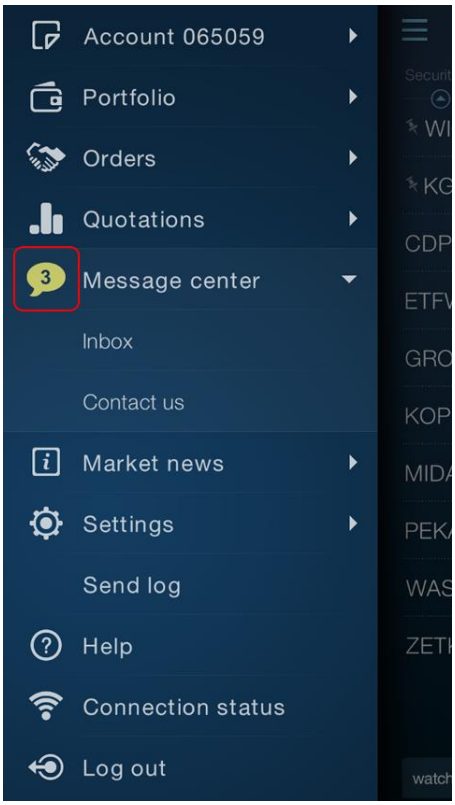
- By adding a new tab: select **Message center** in the screen for adding a new tab.



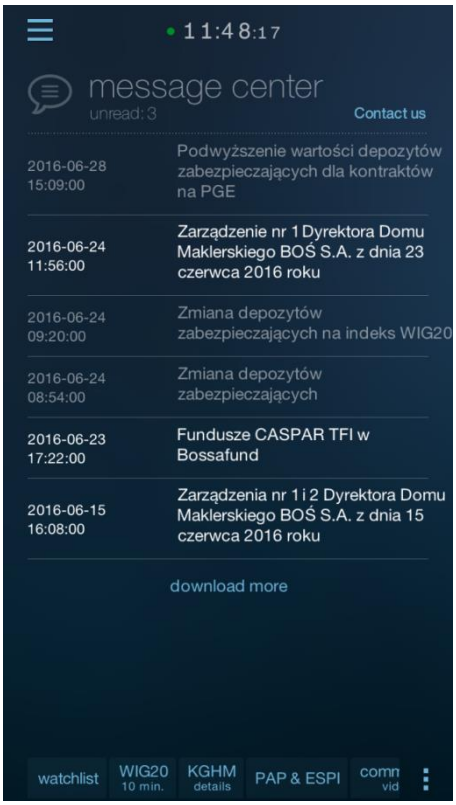
12.1. Inbox

Message center - **Inbox** is used to receive messages sent by broker.

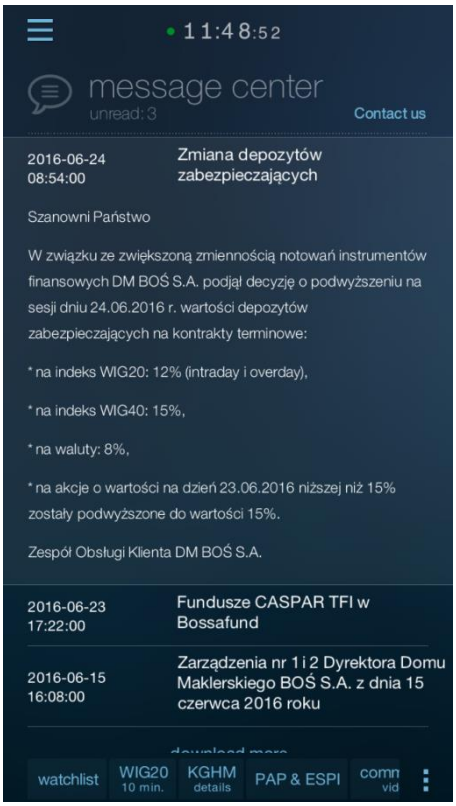
The new message is indicated in the main menu by the appearance of a yellow balloon with information about the number of new messages to read.



When you open the inbox window, the list of **new messages** is retrieved automatically, but you can also retrieve historical messages by using the **download more** button at the bottom of the list. The screen header also includes information about the number of unread messages. Unread messages are marked in the list by highlighting the font.



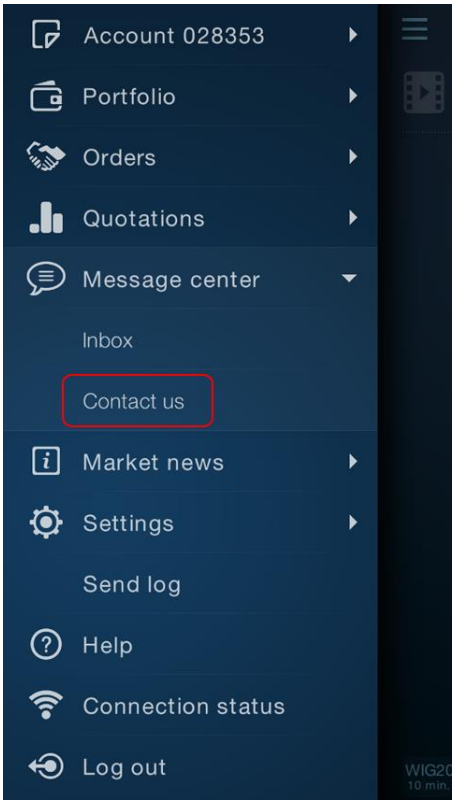
The complete message text is available when you expand the message line, i.e. after tapping the selected item in the list. You can collapse the contents of the open message in the same way:

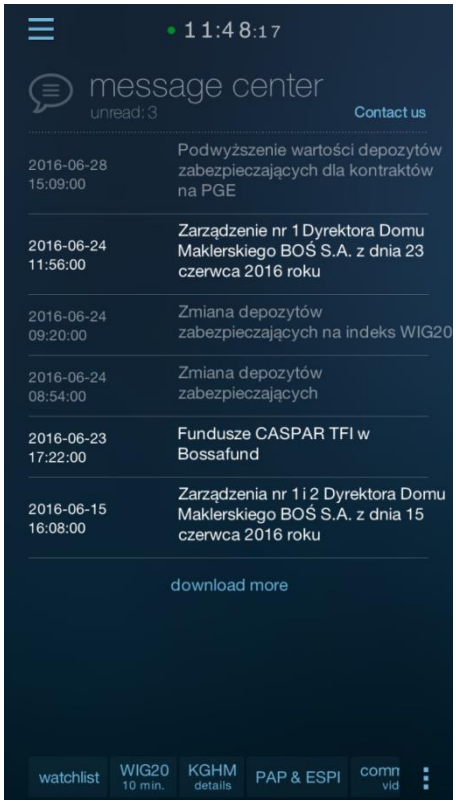


12.2. Contact with broker

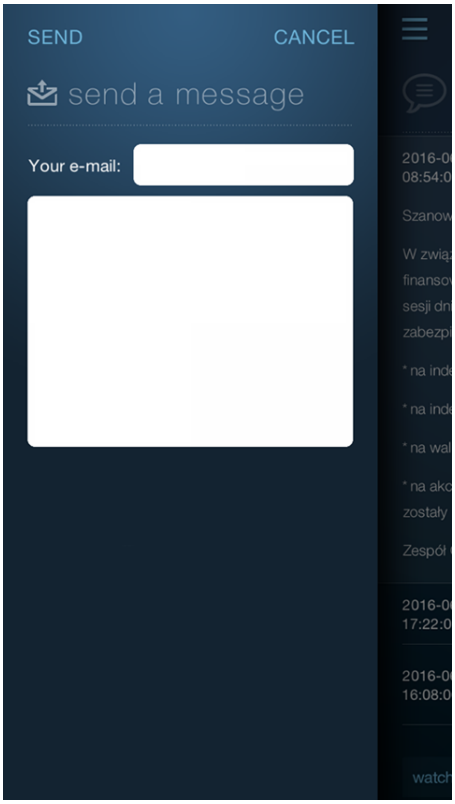
The application also enables to send a message to broker.

The option is available from the application main menu icon , the Message center tab or from the Inbox window, using a Contact us link.





Once the option is selected, you will see a form on the screen where you can enter the message and e-mail address for feedback contact from broker.



13. Notifications

13.1. Internal notifications

The application displays notifications about significant events, which include:

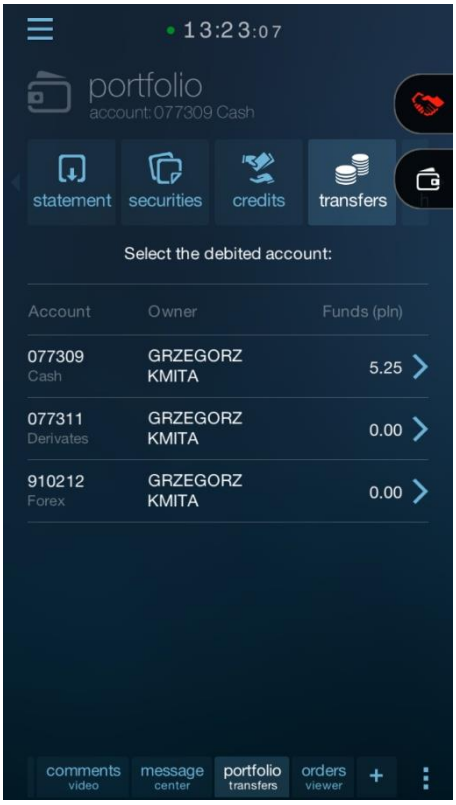
- Closing the deal
- Replenishing/debiting the account
- Consideration of the request
- New message received to the Inbox
- New welcome message (Inbox)

In order for the notification to be displayed, the application must be enabled.

Notification icon appears at the right edge of the application window.

Notifications of various types are placed in sequence one under the other

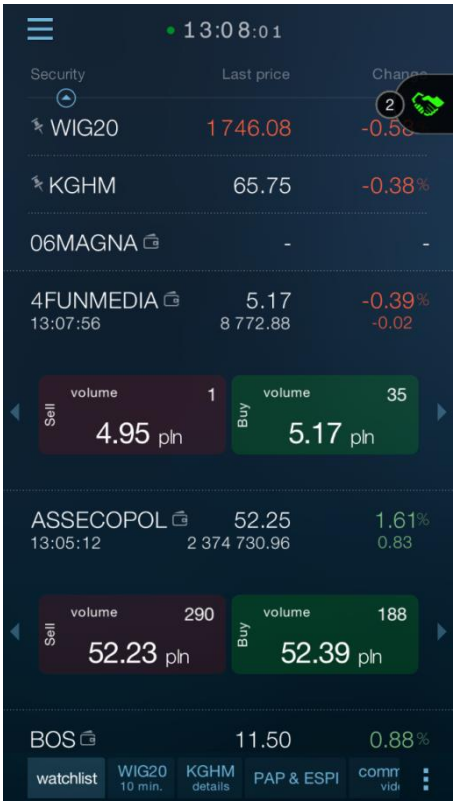
Two notifications of different types



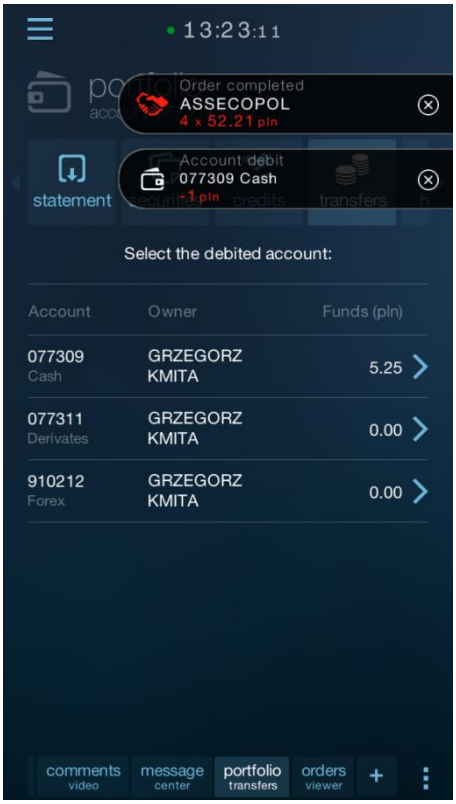
Notifications of the same type (e.g. trades) are grouped. If there are more than 1, the information on the number is displayed to the left of the icon.

Notification example – execution of 1 trade

Notification example – execution of 2 trades



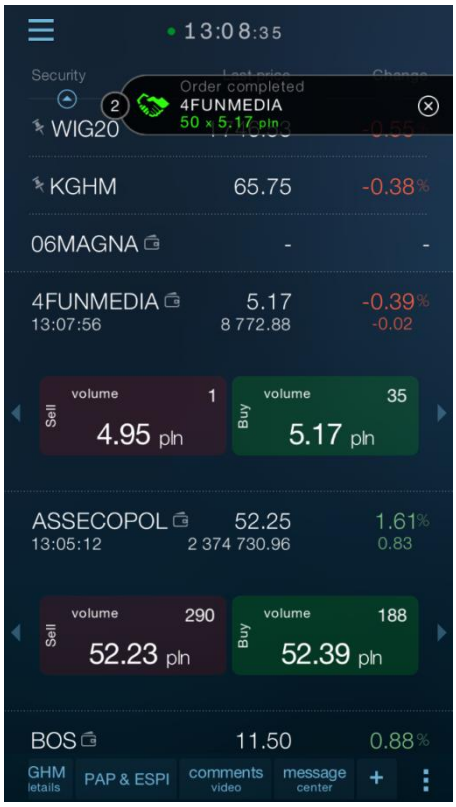
Click on the icon that appears to view the details of the notification. This will extend the notifications tab and show its contents.



If the number of notifications of the same type is greater than 1, the contents will overlap. To view the next notification in a group, you must close the current notification, using the ‘x’ icon.

You can also close the entire group of messages (without having to browse all of them) at any time by dragging the notification tab towards the left edge of the screen.

Notification contents – 1 of 2



Notification contents – 2 of 2

13.2. External notifications

broker may also send external notifications to the user. Such a notification will be shown in the form of the system push message.

Push notifications are displayed only when the application is not running.

Clicking on the push message will open the application and switch to the screen associated with the message.

14. Alerts and Statica Cloud

Alerts are notifications indicating the occurrence of a user-defined event.

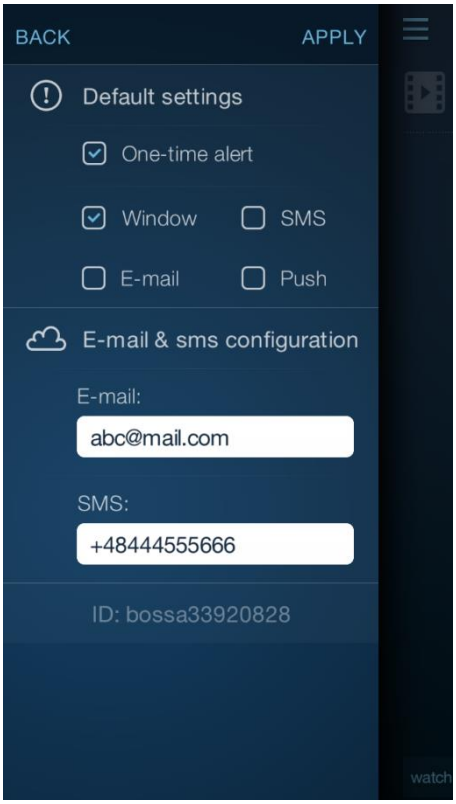
Alerts defined in the program are stored in the Statica Cloud where they are monitored until they are removed. After defining an alert, the application does not have to be running.

You can select several channels through which you will be notified if an alert occurs. For all channels except notifications in the application, the user receives information about an alert even though the program is not running (push, e-mail, text message).

14.1. General alert settings

For alerts to function properly, you have to set them up in advance.

To do this, select Settings/Alerts from the main menu of the application.



“Default settings” group enables to define the initial settings for each new alert definition. You can easily change these settings each time you create a new alert.

The options to be included in this group will be enabled in the new alert definition dialog.

For explanation of these options, see “Define a new alert” [link].

“Setting up e-mail and text message” group enables to configure Statica Cloud so that the application users receive notifications to their e-mail addresses and cell phones.

If you define alerts incoming by e-mail, specify the destination e-mail address.

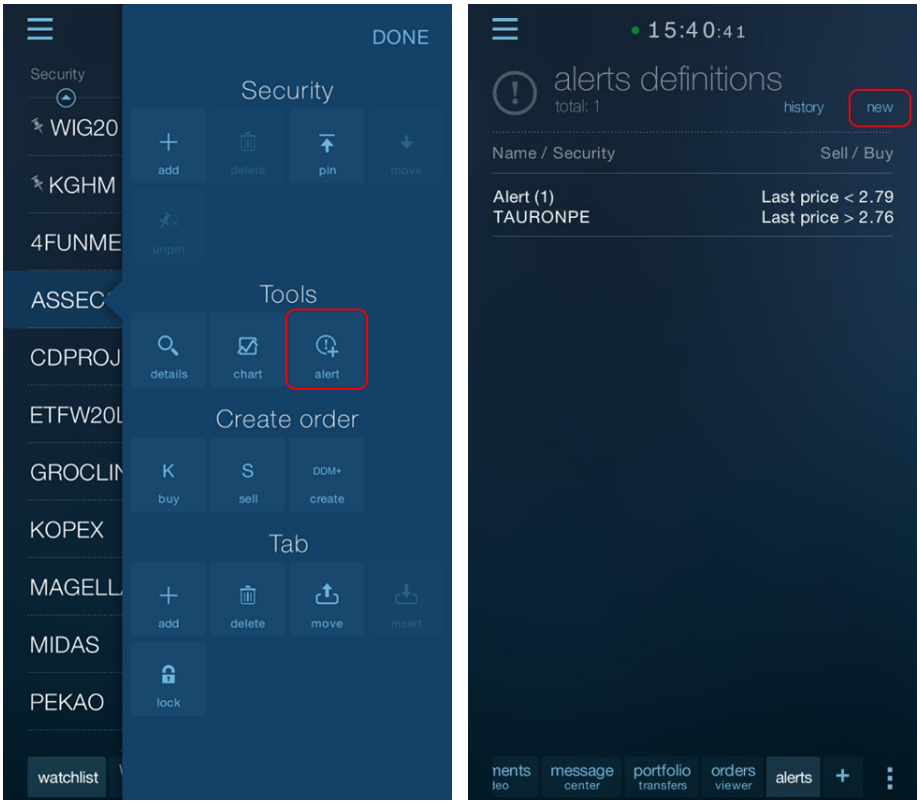
If you define alerts incoming in text messages, specify the destination mobile phone number (usually the one on which the application is running).

Accept the settings using the SAVE button.

If you change or provide your e-mail address or phone number, you will also be asked to confirm the rights to the channel by clicking on the link in the e-mail sent by Statica Cloud or (in the case of a phone number) by entering the code sent to us in a text message complete the setting procedure.

14.2. Defining a new alert

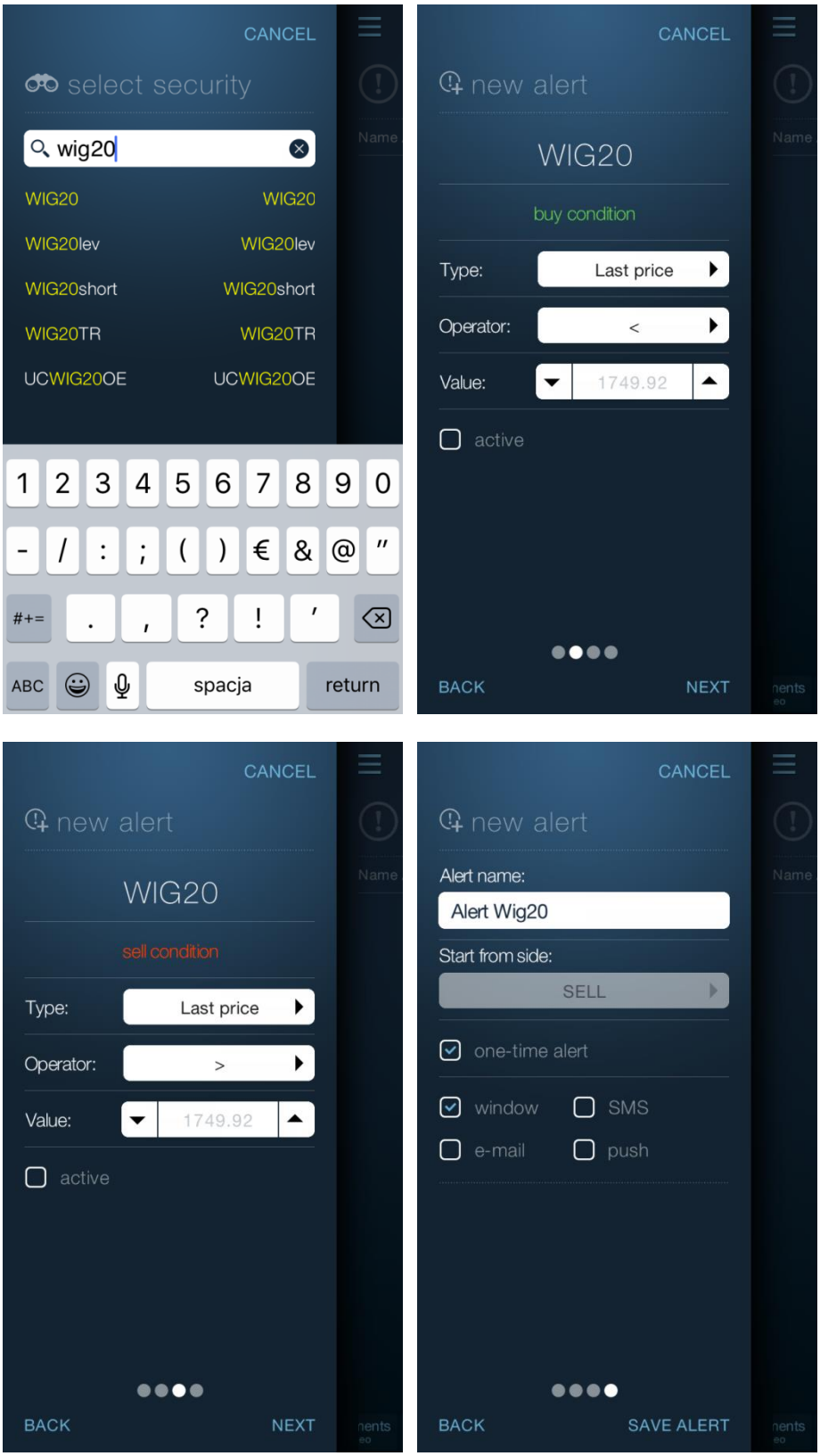
To add the alert, select the appropriate command from the table's pop-up menu or select the "new" button from the "alerts" tab (Alert Manager).



Creating a new alert definition involves defining the situation on which the user wants to be informed and the channels through which this information will be sent when the situation occurs.

The alert definition dialog is used for this.

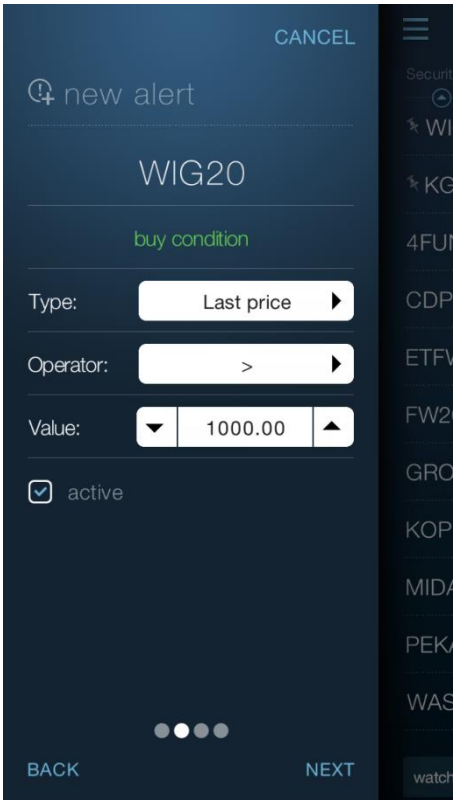
This window is a wizard consisting of four screens, between which you can navigate using "BACK" and "NEXT" buttons.



The transition to more screens may not be possible if the user has not provided the required information on the previous screens. In particular, the transition to the parameters screen will not be possible if at least one alert page (buy or sell) is not activated and defined.

The alert page is defined correctly when the event type, operator, value, and the “active” button are selected.

For example, if you want to be notified when the price of the security selected on the first screen exceeds 1000, you should fill in the fields of the buy or sell page as follows (the difference between unilateral and bilateral alerts is described in the next chapters):



14.2.1. Event types

The program provides many types of events that trigger alerts.

Last price - security rate.

Bid price - the best bid price.

Ask price - the best ask price.

Point change - change the rate of the security (in points) in relation to the reference rate.

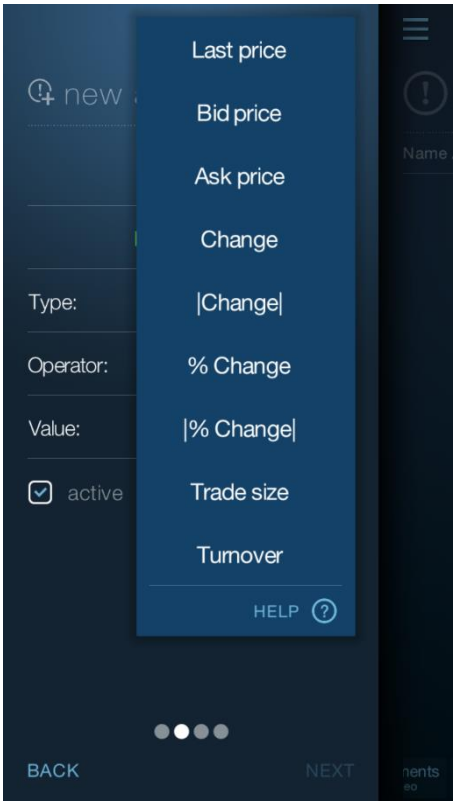
|Point change| - absolute value of the change in the instrument rate (in points) in relation to the instrument rate. The absolute value is independent of the direction of change.

% change - change the rate of the security (in percent) in relation to the reference rate.

|% change| - absolute value of the change in the instrument rate (in percent) in relation to the instrument rate. The absolute value is independent of the direction of change.

Trade size - the volume of the last trade.

Turnover - turnover value of the selected security (during the current session).



14.2.2. One-time alerts

A one-time alert is removed when the condition defined on its buy or sell page is satisfied. Such an alert is generated only once.

14.2.3. Multiple alerts

Multiple alert will be generated and will continue to be monitored in the Statica Cloud when the condition specified in the definition is satisfied. After satisfying the appropriate conditions, the alert may be generated multiple times.

Multiple alert is never removed automatically.

Details of the multiple alert behavior depend on whether it is a single-side or two-side alert as described in the following help paragraphs.

14.2.4. Single-side alerts

Single-side alert is the one that has only one side defined. It does not matter whether it is a buy or sell side.

When the single-side alert has the “one-time alert” option selected, it will be removed after it is generated.

Otherwise (multiple alert), Statica Cloud begins to monitor the alert for the condition opposite to the defined one when the condition specified in the definition is satisfied and a notification is generated.

After reaching the opposite condition, the alert will not be generated but will immediately return to monitoring the condition defined by the user. After it is satisfied, it will be generated again.

For example, for a multiple single-side alert, which should be generated when Price>100, the alert will be generated as shown below for the trades in the example.

Price	Notification
99	
100	
101	
102	
100	
99	
101	
101	
100	
102	
103	

Please note that <= 100 is the condition opposite to >100.

14.2.5. Two-side alerts

Two-side alert is the one which has both buy and sell side defined.

When the two-side alert has the “one-time alert” option selected, it will be removed after it is generated. It does not matter whether it is generated as a result of an event defined on the buy or sell side.

When the two-side alert is a multiple alert, Statica Cloud begins to monitor the alert for the condition opposite to the defined one (or the buy condition in the case of the sell alert, or sell in the case of the buy alert) when the condition specified in one side of the alert is satisfied and a notification is generated.

Once the opposite condition is met, the notification is generated and the alert side changes again.

Therefore, the two-side multiple alert is generated alternately: once for the buy side, once for the sell side.

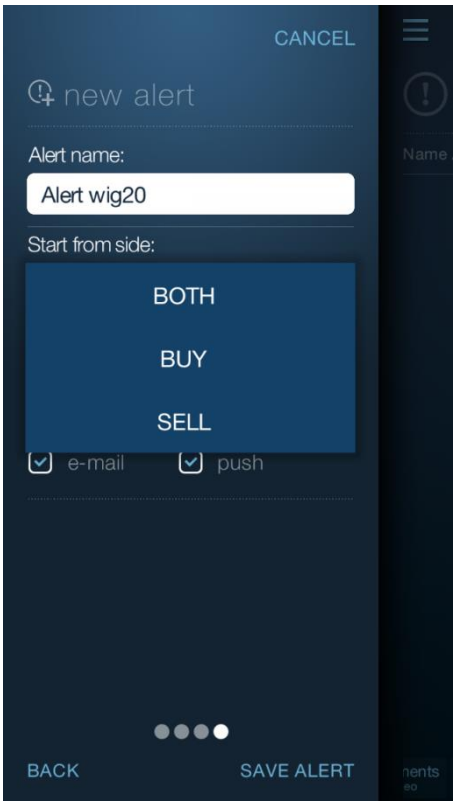
14.2.5.1. Starting side

By default, when the two-side multiple alert is triggered, Statica Cloud initially monitors both defined conditions: buy and sell. As described earlier, the alert will be generated when either of these conditions are met, then only one side will be monitored - the opposite to the one for which the condition was recently met.

You can change the initial behavior of the two-side multiple alert in such a way that the monitoring of the alert corresponded to, for example, the status of owning the security.

If you have a security monitored, you may not be interested in a buy alert, but in the sell alert. You want to receive a buy alert only when the sell alert occurs and funds are released.

The “Start from the side” parameter located on the last tab of the alerts wizard is used for this purpose.



In this example, selecting “Sell” will correspond to the intention of investor – initially, the alert will not be monitored simultaneously for Buy and Sell conditions, but only for the Sell condition. The Buy side will be skipped until generating the Sell alert.

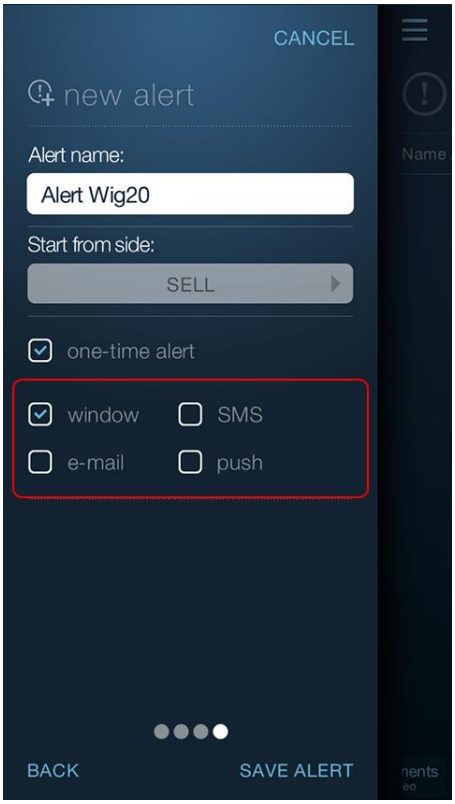
14.2.6. Notification channels

The application provides a number of channels through which the user is informed when an alert occurs.

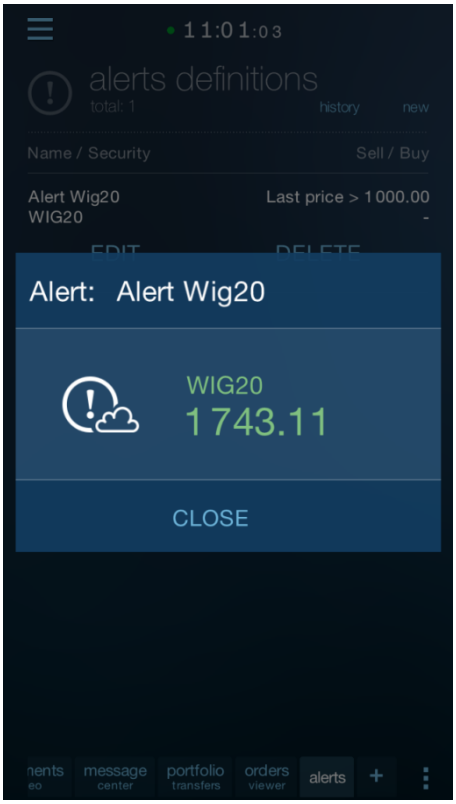
You can define different channels for different notifications depending on the frequency and severity of the alert.

One alert can inform the user of the occurrence of the event via multiple channels simultaneously.

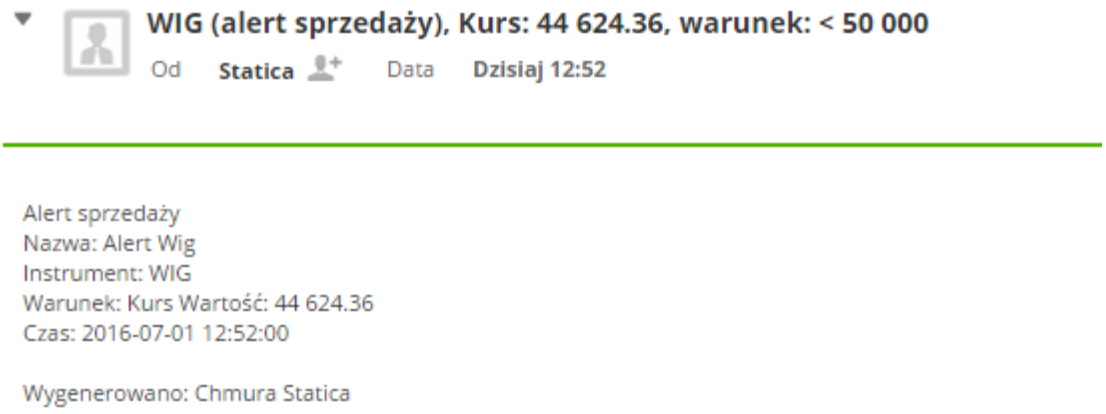
You can select the channel on the last tab of the new alert wizard.



window - the notification will be displayed in the Mobile Quotes program in the pop-up dialog. This type of notification will be provided only at runtime.

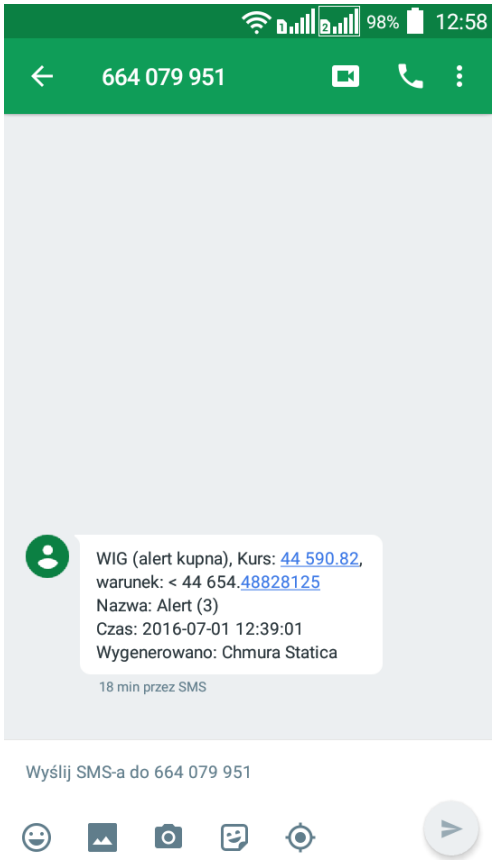


e-mail - the notification will be provided via e-mail. This type of notification will be provided regardless of whether the application is running.

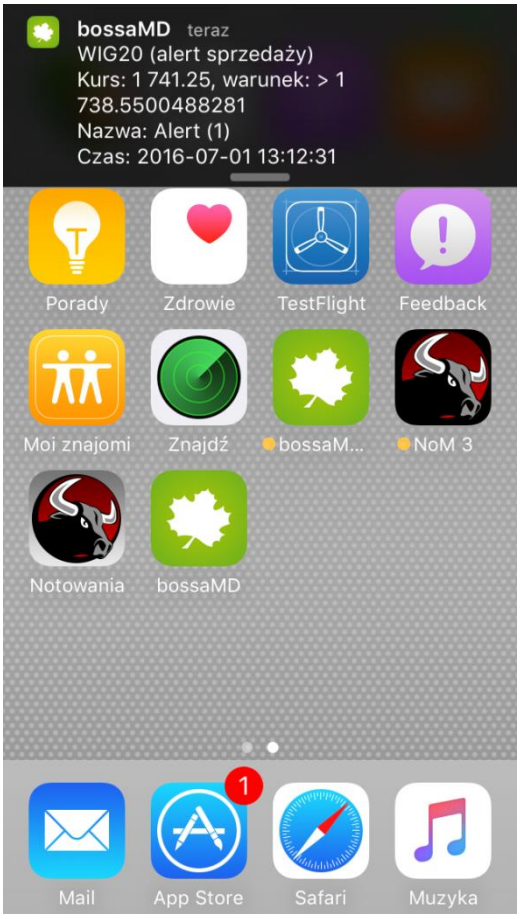


sms - the notification will be provided in the form of a text message sent to the phone number defined in the general program settings. This type of notification will be provided regardless of whether the application is running.

Note! Text message notifications are subject to the limitations in the user subscription. They may not be available in specific cases.



push - the notification will be delivered to the phone as a push message. This type of notification will be delivered only when the application is closed.

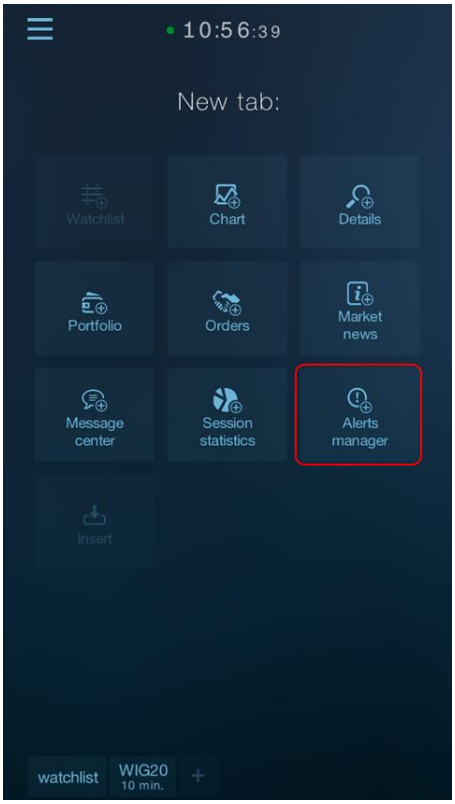


Below is a table with the notification channels and their activity depending on whether Mobile Quotes is running or not.

	Application running	
Channel	**YES**	**NO**
dialog	+	-
push	-	+
e-mail	+	+
sms	+	+

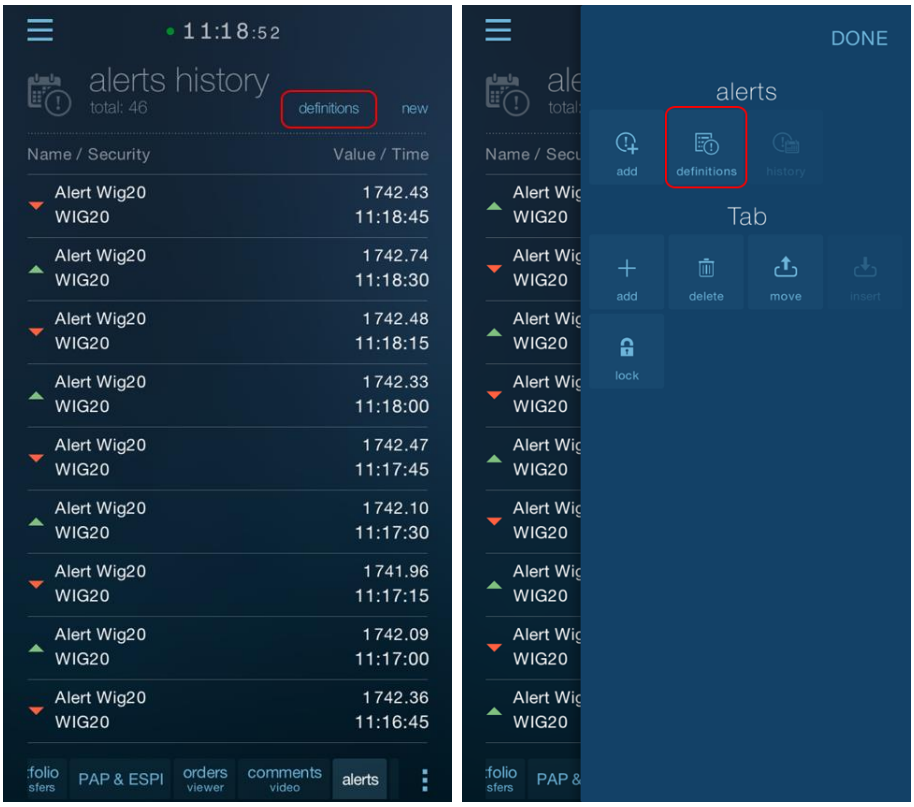
14.3. Alert Manager

Alert manager is a tab with the preview of defined and generated alerts.

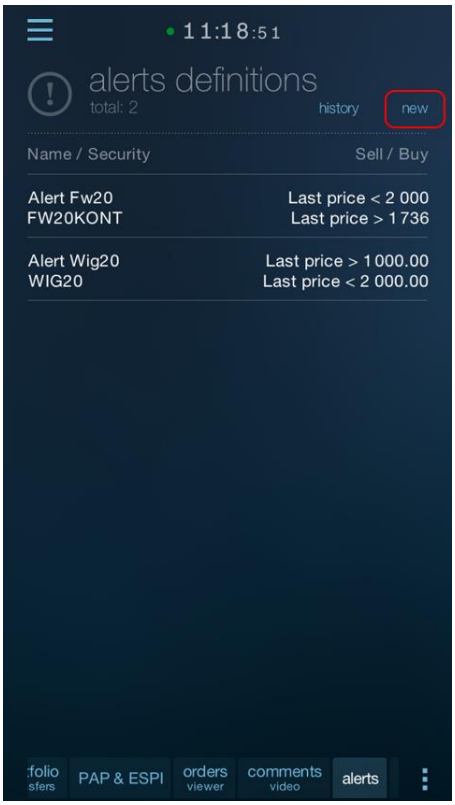


Alert manager has two internal tabs: defined alerts and the history of alerts.

You can switch between the two tabs via the contextual button “definitions/history”.

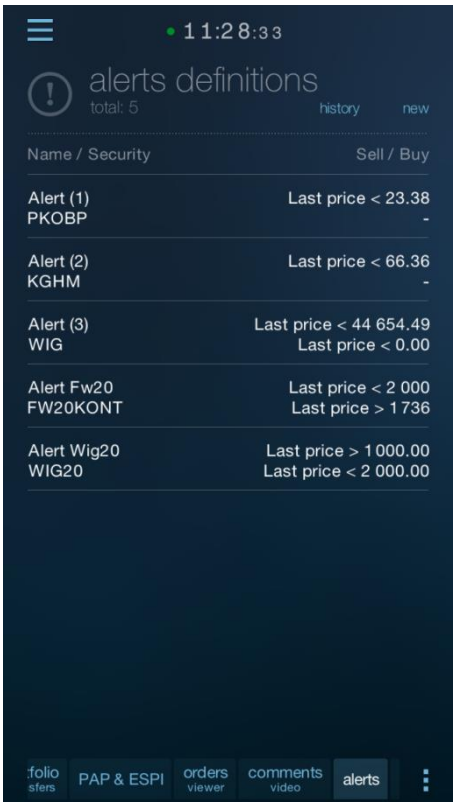


You can create a new alert using the "new” button from the level of this tool regardless of the currently displayed internal tab.

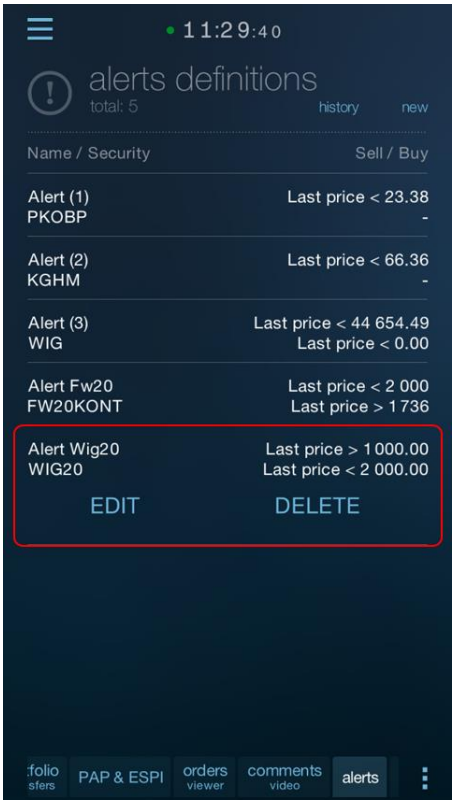


14.2.1. Defined alerts

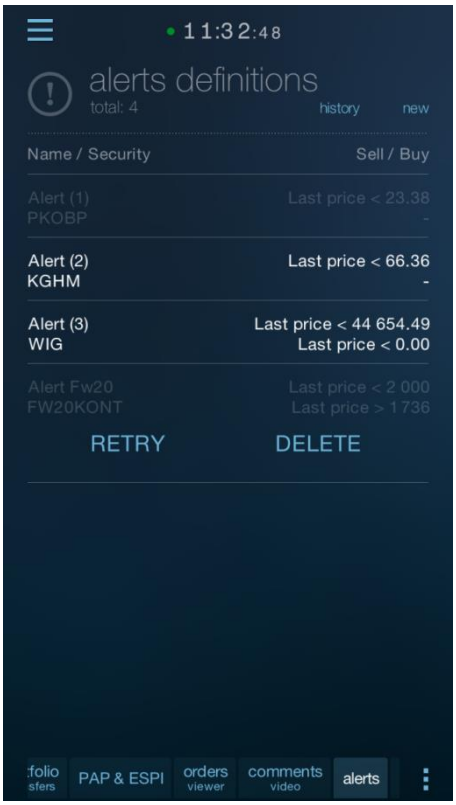
The defined alerts tab shows all user's active alerts.



The alert row can be expanded by clicking on it which enables to remove and edit the row.



Some alert definitions can be grayed-out. These are the alerts which have been automatically deleted by Statica Cloud (the alerts which have already been generated once). They are not active, but you can easily repeat them using the “Resubmit” button.



13.2.2. History of alerts

The History of alerts tab shows the list of alerts generated recently.

Tapping the row with the generated alert changes to the definitions tab and automatically expands the alert line that generated the selected notification.