

Getting Started with Recognia®

Technical Insight™

A Guide for End-Users

Introduction

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

Combining technical analysis with fundamental strategies, Technical Insight helps investors and traders of all skill levels find actionable trade ideas, validated trade opportunities, and automatically monitor your instruments.

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

What this guide covers

This guide will teach you the basics to get started with Technical Insight.

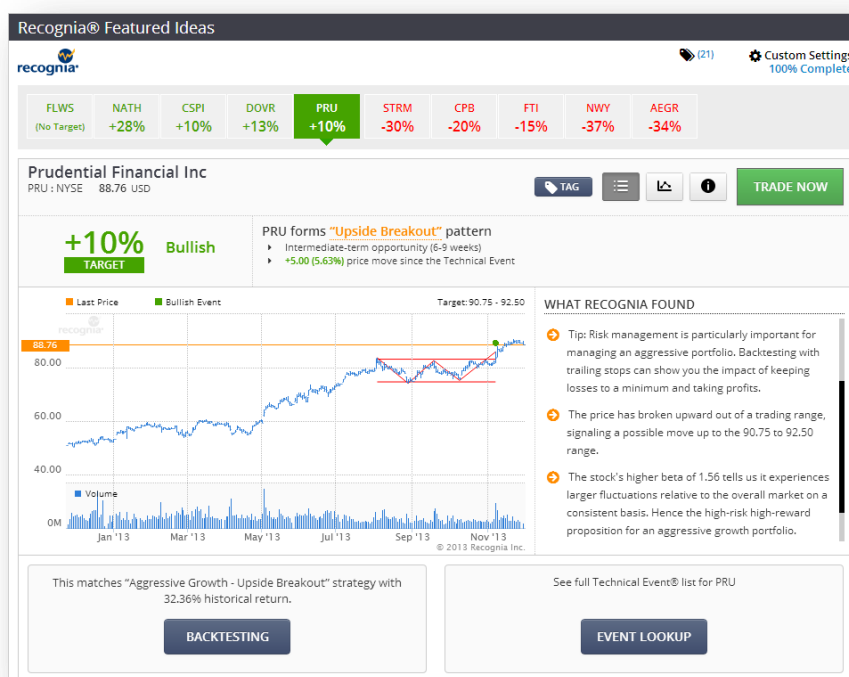
You will learn how to:

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FINDING TRADE IDEAS

With thousands of financial instruments to choose from, finding relevant trade opportunities can be a challenge. But with Technical Insight you get unbiased, unique technical and fundamental analysis that will help in your investment and trading decisions. With Technical Insight you can easily navigate to quickly find trade ideas.

From the main overview page you will see Technical Insight's "Featured Ideas" panel, where every day Recognia automatically identifies up to 10 bullish and bearish instruments with interesting developments based on technical and fundamental analysis, and backtested strategies. You can click through each instrument to see a dashboard with educational commentary that further details exactly why the security was selected.



The Backtesting button below the chart will give you more information on the underlying strategy used to select the idea and show you how that strategy has performed historically. The Event Lookup button will allow you to see a full technical analysis overview on the instrument.

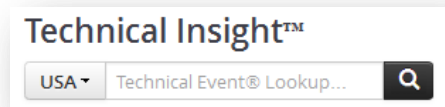
Using the Custom Settings on the top right, you can customize the Featured Ideas to your trading style.

VALIDATE RECENT PICKS AND CHOOSE ENTRY/EXIT POINTS

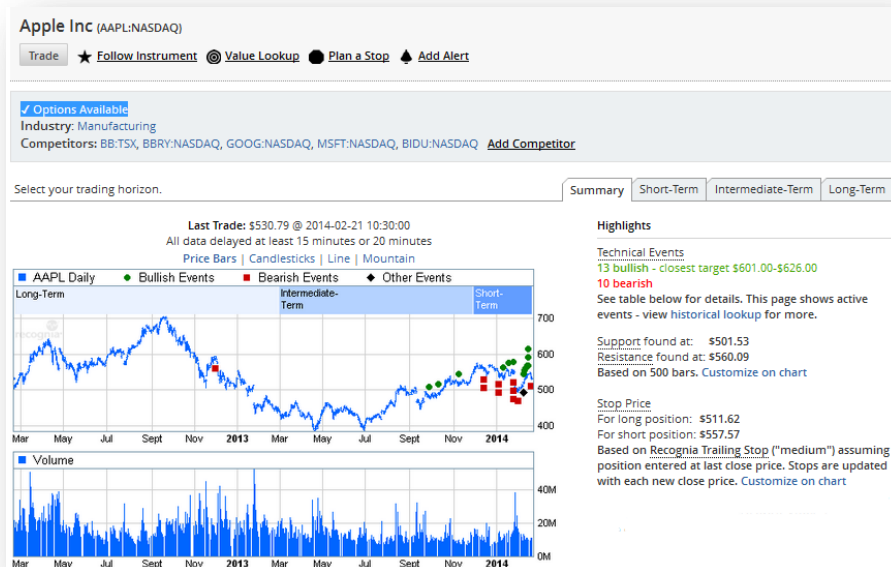
In order to have confidence when making trade decisions, investors want to do due diligence and validate their trade ideas. Recognia Technical Insight will give you an unbiased technical perspective on any instrument of interest to help you see where the price may be headed.

Technical Event Lookup

Either in the Technical Event® Lookup box at the top of the overview page, or from the Technical Event Lookup tab, enter the ticker symbol of your instrument of interest.



After entering a symbol you will be taken to the event lookup page showing a summary for that instrument. Here you will see active Technical Events that have recently been identified for that instrument. A Technical Event is a significant price situation based on the principles of technical analysis, indicating either a bullish or bearish price situation.



The main price chart summarizes the Technical Event opportunities, marked on the price chart using green and red markers. There are many types of Technical Event opportunities – each with their own implication – therefore it is possible to see both bullish and bearish events occurring at the same time. The Technical Event opportunities are listed below the main price chart so that you can review them for more detailed information. Certain types of events offer specific target prices to give you a sense of how far the price might move.

There are three tabs that you can select should you want to look at a specific trading horizon:

- Short-term (outlook for the next 2 to 6 weeks)
- Intermediate-term (outlook for the next 6 weeks to 9 months)
- Long-term (more than 9 months)

As previously mentioned, only active Technical Event opportunities are displayed in order to provide a current outlook for the instrument. To view a fuller history of events, you can recall past events by clicking “Historical Lookup” in the Highlights area to the right of the chart. Here you can also find the “Support & Resistance” lines and the identified “Trailing Stop” levels for both long and short positions. These can both be used to help pick entry and exit points.

Setting Alerts

There are a variety of alerts you can set up to ensure you are notified of significant changes in your portfolio or instruments of interest.

- Watch List alert - this will highlight any Technical Event opportunity on specific instruments and could help you time your entry into an investment or notify you of any adverse moves.
- Technical Event Opportunity Alert – this will notify you when events matching your specified criteria are found.
- Price Threshold Alert – this will notify you when the price for the given instrument crosses a specific level.
- Stop Alert – this will notify you of adverse price movement. Stop values are updated each night so you can check back for the latest value.

More information on Alerts can be found in the next section on Monitoring Instruments.

MONITORING INSTRUMENTS

As the markets shift and securities rise and fall, your portfolio might get out of balance and you may need to make changes to your investments. To ensure you stay on target with your investment goals, it is important you are always aware of where your investments stand. With Recognia Technical Insight you can automate the monitoring of your investments by setting up alerts to notify you when an event of significance happens to any of your holdings.

Setting Alerts for Notifications

Alerts are system-generated emails that notify you when events of significance occur on any of your instruments.

You can set up your alerts in two ways:

1. From the Alerts tab in the product, you can add any new alert by clicking the “Add Alert” button and follow these three easy steps:

Step 1: Select an Alert Type

Provide a name for your alert for future reference, and select the type of alert you want to set up.

Alert Name
Name: <input type="text" value="New Alert"/>

Alert Type
<p>New Opportunities:</p> <p><input checked="" type="radio"/> Alert me about new opportunities.</p> <p>Watch List:</p> <p><input type="radio"/> Alert me about Technical Event® opportunities for symbols of interest.</p> <p><input type="radio"/> Alert me about Technical Event® opportunities for symbols in my saved list.</p> <p>Specific Security:</p> <p><input type="radio"/> Alert me about Technical Event® opportunities for an instrument.</p> <p><input type="radio"/> Alert me when the instrument's price crosses a threshold.</p> <p><input type="radio"/> Alert me when the instrument's price crosses a support/resistance line.</p> <p>Stops:</p> <p><input type="radio"/> Alert me when the instrument's price crosses a stop-loss level.</p> <p>Strategy Builder:</p> <p><input type="radio"/> Alert me about changes to a screen's top results.</p>

Step 2: Instrument Universe Selection

Provide details about the market and industry in which you want new opportunities.

Universe Details

Instrument Type: Security Only: ETFs Optionable

Exchange: USA

Industry: Any

Columbine Capital Quant Rank: Min: 1 (1 being most bullish) Max: 10 (10 being most bearish)

Step 3: Alert Details

Securities from Any US Exchange

Price and Volume

Price on Event Date: Min: Max:

Volume on Event Date: Min: Max:

Market Capitalization: Min: Max:

Event Type (Find companies with these types of events)

Event Class: Classic Patterns Indicators Elliott Waves
 Short-term Patterns Oscillators

Opportunity Type: Bullish (price moving upward) Bearish (price moving downward) Other (short-term patterns only)

Event Type: Any Classic Pattern type

Event Specific Information

Price Period: Daily Weekly Any

Event Duration: Min: Max: (days)

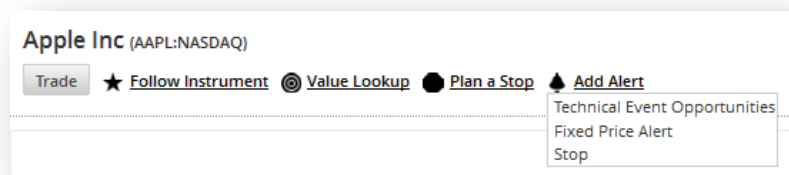
Inbound Trend Duration: Min: Max: (days)

Possible Percentage Price Move: Min: Max: (percent)

More Conditions

Price is above the 200 day moving average (optional: by at least %).

- The second way to have automatic monitoring set up is to enter the ticker symbol into the “Technical Event Lookup” and you will see the option under the company name to “Add Alert” and “Follow Instrument”



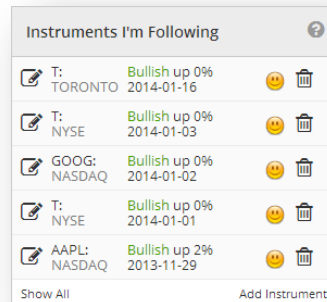
Add Alert

The Add Alert link will allow you to be notified of Technical Event Opportunities that are identified with that particular instrument. You may also use alerts to identify a price crossing a significant threshold

such as a support/resistance line or a trailing stop level. This gives you the ability to stop at your chosen level or strategy.

Follow Instruments

On the main page you'll find a panel called "Instruments I'm Following". There's no easier way to keep tabs on the instruments you're following. Simply add a ticker symbol and indicate whether you call it bullish or bearish. We'll follow it and show you whether the price has gone up or down since your call. This is just an easy way to track the progress of instruments you're interested in.



Instruments I'm Following			
T: TORONTO	Bullish up 0%	☺	🗑️
2014-01-16			
T: NYSE	Bullish up 0%	☺	🗑️
2014-01-03			
GOOG: NASDAQ	Bullish up 0%	☺	🗑️
2014-01-02			
T: NYSE	Bullish up 0%	☺	🗑️
2014-01-01			
AAPL: NASDAQ	Bullish up 2%	☺	🗑️
2013-11-29			
Show All		Add Instrument	

Whether looking to enter or exit a position, or if you simply want to monitor your holdings, Technical Insight's automated alerts will keep you informed of significant events or price movements within your investments, helping you to take timely action and make more informed investment decisions.

Conclusion

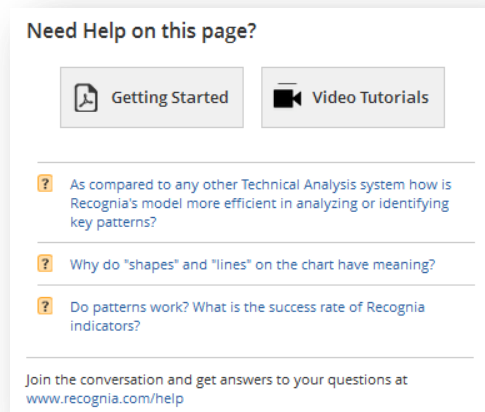
Recognia's Technical Insight provides you with unique investment analysis that will help in your investment and trading decisions. The tool is set up so you can easily navigate through to quickly find trade ideas, validate recent trade opportunities, or have it automatically monitor your instruments for you.

Understanding the technical analysis perspective of your instruments and being notified of significant changes are key to making successful investment choices. Recognia Technical Insight can give you greater confidence and insight in your investment decisions.



Where to find more information


Click the HELP icon near the top right of the page. This will bring up additional tips, guidelines and Frequently Asked Questions. It will also direct you to our Help Forum at <http://www.recognia.com/help>.


You may also visit Recognia's Traders Resources at <http://www.recognia.com/resources/traders> for additional information on Technical Insight and trader's reference material.




Need Help on this page?

 Getting Started  Video Tutorials

 As compared to any other Technical Analysis system how is Recognia's model more efficient in analyzing or identifying key patterns?

 Why do "shapes" and "lines" on the chart have meaning?

 Do patterns work? What is the success rate of Recognia indicators?

Join the conversation and get answers to your questions at www.recognia.com/help