

# Pocket Stock Monitor 5

## Users' Guide



**Thank you for downloading Pocket Stock Monitor!** Become a more sophisticated investor with this invaluable tool for your Windows Mobile phone or PDA. Get stock quotes and increase your returns by keeping in touch with your investments wherever you are - wired or wireless.

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### DEMO Version notice:

The Pocket Stock Monitor DEMO version displays sample stock quote data and does not require an internet connection. To purchase the fully functional full version go to [www.pocketx.net/stocks](http://www.pocketx.net/stocks)

### Installation Instructions:

1. Un-install the demo version (if it's installed) by going to Start>Settings>Remove Programs.
2. Soft-reset the device (important).
3. Connect your device to your PC and establish an Activesync/Windows Mobile Device Center connection.
4. Un-zip the downloaded installation file into a folder on your Windows desktop.
5. Double click on the .exe file (pocketstockmonitor\_ppc..) to install Pocket Stock Monitor. If prompted to choose the installation destination, select device (internal memory - important).
6. Look at the phone/PDA and authorize the installation (important).

**Congratulations!** Now you can run the program from the **Start>Programs** menu.



# Pocket Stock Monitor 5

Quick Start Guide

**POCKETX**  
Software

**Type-in a stock symbol and click Add Symbol to place it into the Active Portfolio**

**Click here to open the Portfolio Editor**

**Portfolio List - shows the currently active portfolio. Select a portfolio from the list to make it the active portfolio and load the most current data.**

**Market Index Window #1**  
displays price information for the first index (customizable)

**Market Index Window #2**  
displays price information for the second index (customizable)

**START/Go! Button**  
Press START to enable the quote fetch timer. Press Go! while the timer is running to get an instant quote update.

**TIMER**  
Decrementing Numeral indicates time (seconds) to next quote update

**STOP Button**  
stops the quote timer and clears all graphs at next start

**Index Quote View (this view)**

**Detail View**  
Maximum quote information for one stock

**Quad Quote View**  
Displays four stocks at a time

**12-Quote View**  
Displays twelve stocks at a time

**Market Index#1 Graph**  
Graphs price data cumulatively for first market index

**Price Trend Indicator:**  
- GREEN for price increase  
- RED for price decrease  
- WHITE for no change (relative to last known price)

**Market Index #2 Graph**  
Graphs price data cumulatively for second market index

**Graph/Extended View**

**Clear Graph**

**Cycle through Graph Backgrounds**

The screenshot shows the following data on the screen:  
- Top bar: "Pocket Stock Monitor" and "New Portfolio" dropdown.  
- NASDAQ COMPOSITE: 2193.88 (High: 2198.66, Low: 2164.54, Change: +13.56, % Ch: 0.62).  
- DOW JONES INDUSTR: 11144.06 (High: 11180.29, Low: 11075.22, Change: +15.77, % Ch: 0.14).  
- Bottom bar: "Go!" button, timer "100", "Stop" button, and view selection buttons (1, 4, 12).

## Overview

Use Pocket Stock Monitor to monitor the investment markets and the performance of your favorite stocks, mutual funds, indices, bonds, options or currency exchange rates, while you work or when you're mobile.

When you are working in your office, put your Pocket PC or phone in its cradle and use Pocket Stock Monitor to continuously monitor your stocks and the stock markets. Glance at your device every once in a while to see how your stocks and the markets are doing. When you're on the road, connect wirelessly and get stock quotes anywhere, any time!

Pocket Stock Monitor will fetch your favorite stock prices at a time interval that you set. It will display the information in large font so you can always glance to your device and see how your investments are performing. You can also monitor the current status of your preferred stock market indices.

Pocket Stock Monitor calculates profit/loss and total dollar balances of your investments with latest quote price information.

The program incorporates an easy to use timer that will fetch your stocks at a desired interval (for example, you can update the price of your favorite stocks and market indicators automatically every 5 minutes).

## Using the program

### Obtaining an Internet Connection

Pocket Stock Monitor is an application that requires an active internet connection in order to display stock quotes.

All Windows Mobile 6.1/6/5, Pocket PC 2002 and Pocket PC 2003/SE devices are able to access the internet when connected to their cradle, if the desktop computer that they're connected to already has an internet connection.

You can also connect your handheld to the internet via a modem, an Ethernet card, a wireless Ethernet (WiFi) connection, Bluetooth connection or a cellular data connection provided by your wireless service provider (like 3G, HSDPA, GPRS, EVDO, etc.).

### Supported Exchanges

Pocket Stock Monitor supports major North and South American, European, Asian and Australian stock exchanges. All quotes are delayed at least 20 minutes. To get quotes from international or specialized exchanges, add the appropriate suffix to your symbols as defined in the tables on page 5. Please see the list of supported exchanges on page 5.

**Example – To get a quote for the symbol ATY from the Toronto exchange, add the .TO suffix - ATY.TO**

### Getting Stock Quotes

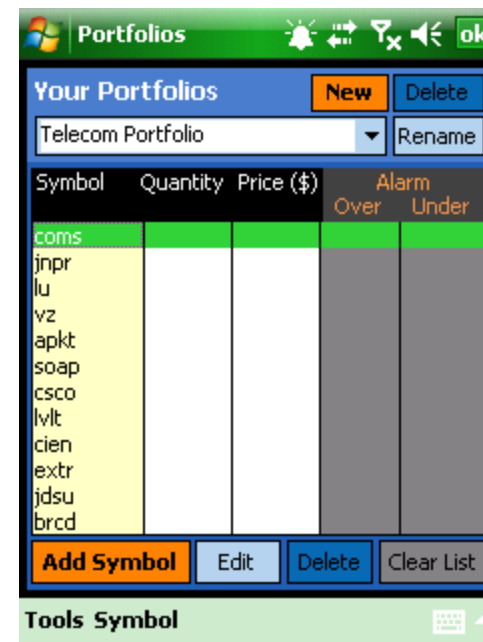
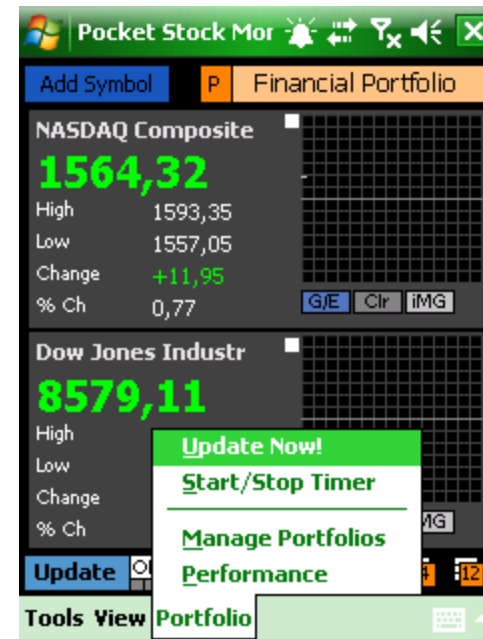
Pocket Stock Monitor allows you to quickly retrieve stock prices by tapping on the "Update" button. Press "Update" and Pocket Stock Monitor will connect to the internet to get the latest price information.

The program also features an intelligent fetch timer that fetches data automatically at a pre-defined interval (eg. Every 4 minutes). Press the "Timer" button to start the fetch timer. If you tap on the Update button while the timer is running, you will get an instant price update. When the timer is running, press the "Stop" button to stop it.

In both modes, pricing information is updated for all portfolios. If the timer is not running, selecting one of the portfolios from the Portfolio List pull-down will show the latest price information for that portfolio without initiating a new fetch.

### Portfolio Manager

Pocket Stock Monitor comes installed with pre-defined sample portfolios of stock symbols, indices and currency exchange symbols. You can add your own portfolios, delete unwanted symbols, etc. by using the Portfolio Manager. Tap on Portfolios>Manage Portfolios or tap on the "P" button next to the currently active profile name in the main view to open the Portfolio Manager. Once in the portfolio manager, use the top buttons to add a new portfolio, delete a portfolio or edit the portfolio name. Use the bottom buttons (or the Symbol menu on square screen devices) to add symbols to the portfolio, edit symbols, delete symbols and clear the portfolio.



## **Alarms**

The program supports audible alarms that can be triggered by the stock price being higher or lower than predefined alarm settings. Edit the portfolio to add an over or under alarm to any one of the stocks in your portfolio. An over alarm is triggered by the price being higher than the setting. An under alarm is triggered by the price being lower.

## **Symbol Lookup**

To look up a stock symbol, tap on Tools>Symbol Lookup in the program. The program will open Internet Explorer and connect to a page where you can enter the name of the company you're interested in.

## **Index View [i]**

The [i] index screen in Pocket Stock Monitor is designed to display price information for two market indices. To modify which indices are displayed in this window, go to the Portfolio window and tap on the Index button.

## **Detail View [1]**

The [1] screen displays detailed information for one stock. Use the quick list pull-down (grey arrow button) to select which stock is displayed in this screen. Tapping on the price will change the color used to display it. News and a daily chart for the stock is available from this view.

## **Quad Quote View [4]**

The [4] screen displays information for four stocks at one time. Tap on the company names to change stocks shown in this view.

## **12-Quote View [12]**

The [12] screen displays information for twelve stocks at one time as well as profit/loss information. Tapping on the "C" or "Color" button changes the colors of the table. Tapping on the green Quote/Company/Profit button (or green [\$] button for square screen devices) will switch between the Regular, Company and Profit/Loss views. Tapping on the symbol in this view will open the Detail View for detailed quote information.

## **Graphs**

Graphs in Pocket Stock Monitor are cumulative – for every quote fetch one point is drawn on the graph. Letting Pocket Stock Monitor run in timer mode will graph the activity for that time period. Tapping on the "C" button for any graph will clear it. Tapping on the IMG button will change the graph background. Tapping on the G/E button will toggle graph visibility and show the Extended viewing mode.

## **Profit/Loss Performance**

If stock purchase prices and quantities are defined for stocks in your portfolios, total profit/loss information for the Active Portfolio is shown by tapping Portfolio>Performance from the main menu. Tapping on the green [Quote/Company/Profit Views] button when in 12-Quote View will cycle to the profit view mode showing per-share change, profit/loss and total holdings for a particular equity.

## **Options and Preferences**

To access the Preferences screen tap Tools>Options in the program.

**Location** – Leave at DEFAULT unless you are unable to obtain quotes or the quotes are not in your local currency. In that case please select the location closest to you from the menu.

**Timer Interval** – this setting determines how often the quotes are fetched when the timer is enabled.

**Connection Timeout** - If you're using a slower cellular or GPRS internet connection and you're having trouble connecting, specify a longer timeout in this field.

## **General Troubleshooting**

A general rule of thumb is that if you can use Pocket Internet Explorer to browse the internet, you will be able to use Pocket Stock Monitor. If you're behind a corporate firewall, you will need to configure proxy and/or firewall settings in Start>Settings>Connections on the device. In this case, please consult your system administrator for the appropriate parameters.

### ***Frequently Asked Questions***

For the most up to date answers to frequently asked questions go to our website at: [www.pocketx.net/stocks](http://www.pocketx.net/stocks)

### ***Getting the latest information, product updates and new versions***

To get the most up to date information about Pocket Stock Monitor, go to our website at: [www.pocketx.net/stocks](http://www.pocketx.net/stocks)

Please let us know if you have any feature suggestions or requests by filling out the suggestion box on our website.

### ***Obtaining Support***

To submit a support inquiry, please visit our website at: [www.pocketx.net/support](http://www.pocketx.net/support)

**Thank you! We hope you will enjoy using Pocket Stock Monitor! - The PocketX Team**

## World Exchanges and Suffixes\*

Country	Exchange	Suffix	
<b>United States</b>	American Stock Exchange	-	
	New York Stock Exchange	-	
	NASDAQ Stock Exchange	-	
	OTC Bulletin Board Market	.OB	
	Pink Sheets	.PK	
	Chicago Board of Trade	.CBT	
	Chicago Mercantile Exchange	.CME	
	New York Board of Trade	.NYB	
	New York Commodities Exchange	.CMX	
	New York Mercantile Exchange	.NYM	
	<b>Argentina</b>	Buenos Aires Stock Exchange (BUE)	.BA
	<b>Austria</b>	Vienna Stock Exchange	.VI
<b>Australia</b>	Australian Stock Exchange (ASX)	.AX	
<b>Brazil</b>	Sao Paulo Stock Exchange (SAO)	.SA	
<b>Canada</b>	Toronto Stock Exchange (TOR)	.TO	
	TSX Venture Exchange (CVE)	.V	
<b>China</b>	Shanghai Stock Exchange (SHH)	.SS	
	Shenzhen Stock Exchange (SHZ)	.SZ	
<b>Denmark</b>	Copenhagen Stock Exchange (CPH)	.CO	
<b>France</b>	Paris Stock Exchange (PAR)	.PA	
<b>Germany</b>	Berlin Stock Exchange (BER)	.BE	
	Bremen Stock Exchange (BRE)	.BM	
	Dusseldorf Stock Exchange (DUS)	.DU	
	Frankfurt Stock Exchange (FRA)	.F	
	Hamburg Stock Exchange (HAM)	.HM	

\*Please note that the list of supported exchanges is subject to change any time.

## INSTRUCTIONS

To get quotes from international exchanges or specialized USA exchanges (like OTC BB) , add the appropriate suffix to your stock symbols.

**Example – To get a quote for the symbol ATY from the Toronto exchange, add the .TO suffix – the symbol is **ATY.TO****

	Hanover Stock Exchange (HAN)	.HA
	Munich Stock Exchange (MUN)	.MU
	Stuttgart Stock Exchange (STU)	.SG
	XETRA Stock Exchange (GER)	.DE
<b>Hong Kong</b>	Hong Kong Stock Exchange (HKG)	.HK
<b>India</b>	Bombay Stock Exchange (BSE)	.BO
	National Stock Exchange of India (NSI)	.NS
<b>Indonesia</b>	Jakarta Stock Exchange (JKT)	.JK
<b>Israel</b>	Tel Aviv Stock Exchange (TLV)	.TA
<b>Italy</b>	Milan Stock Exchange (MIL)	.MI
<b>Korea</b>	Korea Stock Exchange (KSC)	.KS
	KOSDAQ (KOE)	.KQ
<b>Mexico</b>	Mexico Stock Exchange (MEX)	.MX
<b>Netherlands</b>	Amsterdam Stock Exchange (AEX)	.AS
<b>New Zealand</b>	New Zealand Stock Exchange (NZE)	.NZ
<b>Norway</b>	Oslo Stock Exchange (OSL)	.OL
<b>Singapore</b>	Singapore Stock Exchange (SES)	.SI
<b>Spain</b>	Barcelona Stock Exchange (BAR)	.BC
	Bilbao Stock Exchange (BIL)	.BI
	Madrid Fixed Income Market	.MF
	Madrid SE C.A.T.S. (MCE)	.MC
	Madrid Stock Exchange (MAD)	.MA
	Stockholm Stock Exchange (STO)	.ST
<b>Sweden</b>	Stockholm Stock Exchange (STO)	.ST
<b>Switzerland</b>	Swiss Exchange (SWX)	.SW
<b>Taiwan</b>	Taiwan OTC Exchange (TWO)	.TWO
	Taiwan Stock Exchange (TAI)	.TW
<b>United Kingdom</b>	London Stock Exchange (LSE)	.L

## World Indices\*

Country	Exchange	Symbol
<b>North and South America</b>		
Argentina	MerVal	^MERV
Brazil	Bovespa	^BVSP
Canada	S&P TSX Composite	^GSPTSE
Chile	IPSA	^IPSA
Mexico	IPC	^MXX
United States	S&P 500	^SPX
<b>Asia and Pacific</b>		
Australia	All Ordinaries	^AORD
China	Shanghai Composite	^SSEC
Hong Kong	Hang Seng	^HSI
India	BSE 30	^BSESN
Indonesia	Jakarta Composite	^JKSE
Japan	Nikkei 225	^N225
Malaysia	KLSE Composite	^KLSE
New Zealand	NZSE 50	^NZ50
Pakistan	Karachi 100	^KSE
Philippines	PSE Composite	^PSI
Singapore	Straits Times	^STI
South Korea	Seoul Composite	^KS11
Sri Lanka	All Share	^CSE
Taiwan	Taiwan Weighted	^TWII

\*Please note that this list is subject to change any time.

## Currency Exchange Rates

Currency Rate	Symbol
USD to CAD	USDCAD=X
CAD to USD	CADUSD=X
USD to EUR	USDEUR=X
USD to JPY	USDJPY=X

Europe		
Austria	ATX	^ATX
Belgium	BEL-20	^BFX
Czech Republic	PX50	^PX50
Denmark	KFX	^KFX
France	CAC 40	^FCHI
Germany	DAX	^GDAXI
Hungary	Budapest SE Index	^BUX
Italy	S&P MIB	^SPMIB
Ireland	Irish SE Index	^ISEQ
Netherlands	AEX General	^AEX
Norway	Total Share	^OSEAX
Portugal	PSI 20	^PSI20
Russia	Moscow Times	^MTMS
Slovakia	SAX	^SAX
Spain	Madrid General	^SMSI
Sweden	Stockholm General	^SXAXPI
Switzerland	Swiss Market	^SSMI
Turkey	ISE National-100	^XU100
United Kingdom	FTSE 100	^FTSE
Middle East		
Egypt	CMA	^CCSI
Israel	TA-100	^TA100

# Frequently Asked Questions

## Questions related to **Compatibility**

Question	<b>Will Pocket Stock Monitor work on my phone or Pocket PC?</b>
Answer	<p>Pocket Stock Monitor 5 is compatible with all Windows Mobile phones with touch-screens, Pocket PC and Pocket PC Phone Edition devices.</p> <p>This includes all Windows Mobile 6.1, 6, Windows Mobile 5 and Pocket PC 2003/SE devices and phones with touch-screens.</p>
Question	<b>I see two editions of Pocket Stock Monitor. Which one do I need?</b>
Answer	<p>If you have a Windows Mobile 5, Windows Mobile 6.1/6 or Pocket PC 2003/SE device, select Pocket Stock Monitor 5.</p> <p>If you own an older Pocket PC 2000 or 2002 device, select Pocket Stock Monitor 2.11.</p>

## Questions related to **Installation**

Question	<b>When trying to install the program I get the "installation unsuccessful" message.</b>
Answer	<ul style="list-style-type: none"> <li>If an old version of the program or the demo version is already installed, un-install it via Start&gt;Settings&gt;Remove Programs. Soft-reset and then try installing again.</li> <li>If installation is still unsuccessful then check free memory on the device - go to <b>Start&gt;Settings&gt;Memory</b> and make sure that you have at least 6MB free Storage Memory and 8MB free Program Memory. If the device is low on memory, <b>soft-reset</b> the device and then check the memory again. If storage memory is still low then un-install a few un-needed programs by going to <b>Start&gt;Settings&gt;Remove Programs</b> or delete some large files using File Explorer. Then try installing again.</li> <li>Finally if you're still getting this message then do this: <ul style="list-style-type: none"> <li>Using File Explorer on the phone or your desktop computer, browse to the \Windows folder on your device and make sure that all "PVB*" files are deleted (make sure that the Menu&gt;"Show All Files" option is enabled so you can see them): <p>PVBCtrl, PVBDcl, PVBFrm2, PVBHost2, PVBLoad, PVBKill, pvbvbs</p> </li> <li>Soft-reset the device and then install the program into main memory.</li> </ul> </li> </ul>

Question	<b>I am getting a "Failed to load resource DLL MSDAERxx.DLL" message during installation.</b>
Answer	Before installing, switch your Regional Setting to English (United States) in Start>Settings>Regional and then install the program. After the installation is complete, switch the regional setting back to what it was and you will be able to use the program.
Question	<b>Should I install Pocket Stock Monitor onto a memory card or in main memory?</b>
Answer	We recommend that the program be installed in main memory of the device for best and most reliable operation.
Question	<b>I installed Pocket Stock Monitor according to the directions supplied. However when I attempt to execute the program I receive the following error message:</b>
Answer	<p>"No Application associated with 'stockmonitor'. Run the application first, then open this file from within the application".</p> <p>This is a simple case of broken associations and a bug in the Pocket PC operating system. When an application that uses Embedded Visual Basic components is uninstalled, the un-install routine of the Pocket PC will remove the .vb extension association.</p> <p>To correct this simply re-install Pocket Stock Monitor. If you're still getting this error, follow the instructions below.</p> <p><b>Fixing the .vb file association</b></p> <p>Associate the .vb extension with "pvbload.exe" on the Pocket PC. The easiest way to do this is to use the "myExtensions" program for the Pocket PC.</p> <p>To download myExtensions, go to:  <a href="http://www.badschwii.com/software_features.asp?swid=2">http://www.badschwii.com/software_features.asp?swid=2</a></p> <p>Install myExtensions on your Pocket PC, run it and then:</p> <ol style="list-style-type: none"> <li>You will see a list of extensions on the left of myExtensions. Scroll down until you see <b>.vb</b></li> <li>Double tap on <b>.vb</b> to Edit the extension</li> <li>In the Command field, type without quotes "\windows\pvbload.exe"</li> <li>In the Icon field, type without quotes "pvbhost2.dll,-2"</li> <li>In the Description field, type without quotes "VBCE 2.0 Project File"</li> <li>Tap the green OK button</li> <li>Soft-reset the Pocket PC</li> </ol>

Questions related to <b>Operation</b>	
Question	<b>When trying to connect, I am getting an error that says "The chunk length was not valid".</b>
Answer	<p>This error can occur on older Pocket PC 2003 devices that do not have the correct .Net components update from Microsoft.</p> <p><a href="#">Click here to download .Net Compact Framework 1.0 SP3</a></p> <p>After you download the installation package from Microsoft, connect your device to Activesync and run the downloaded exe file. Your device will be updated with the latest components.</p>
Question	<b>I can get quotes with Pocket Stock Monitor but I don't see any graphs. What else do I need to do?</b>
Answer	<p>Graphs in Pocket Stock Monitor are cumulative and update every time a quote is fetched. For every price update, one point is drawn on the graph. Let Pocket Stock Monitor fetch quotes in automatic timer mode and you will get a full graph for the time period in question.</p>
Question	<b>How can I connect to the internet so that Pocket Stock Monitor can fetch quotes?</b>
Answer	<p>You can use any kind of an internet connection with Pocket Stock Monitor - Ethernet, WiFi, Bluetooth, Modem, Activesync-Passthrough, GPRS, EVDO, etc.</p> <p>If you don't have a wireless or a networked connection on your Pocket PC simply plug your Pocket PC in its cradle. If you have an internet connection on your PC, it will be transferred to your Pocket PC via "Activesync Pass-through".</p>
Question	<b>I would like to monitor international stocks and Currency Exchange rates. How do I do that?</b>
Answer	<p>Pocket Stock Monitor is able to get quotes from all around the world including Europe, Asia, US, Canada, India, etc. Please refer to the Users Guide included with the installation package for detailed information about supported exchanges.</p>
Other Questions?	<a href="#">Contact us</a> at <a href="http://www.pocketx.net/support">www.pocketx.net/support</a> and we will be glad to help!