



Audio Script: Get Technical, Get to know Merrill Edge MarketPro®

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Audio Script:

Welcome to the first on demand webinar in our get technical series. In this webinar, we are going to introduce you to Merrill Edge MarketPro®. We use this platform throughout the series to build charts and analyze from a technical perspective. However, this platform has many uses beyond technical analysis that we will explore today. This video is intended to get you acquainted with Merrill Edge MarketPro® in preparation for the utilization of this platform throughout the series. This presentation is for informational purposes only.

Investing involves risk, therefore, please take a moment to read through and be aware of all of the information contained in these disclosures. Although we are not covering technical analysis today, this series does, it is important to know that technical analysis is performed by an individual and involves many theories. You can contact us if you have questions on this information or anything else we cover today.

Here is what you can expect to take away from this webinar. First, we are going to briefly talk about what MarketPro is. I'll walk you through accessing MarketPro and setting up your workspace. Then, we will cover the trading features of the platform and spend time learning about the customization of charts.

Lastly, I will leave you with some helpful navigational tips that will help you learn the platform.

What is Merrill Edge MarketPro®?

What is Merrill Edge MarketPro®? Well, Merrill Edge MarketPro® is a fully customizable platform that provides real-time data analysis or streaming quotes. The platform houses many tools and resources for the self-directed investor. Throughout this series we use MarketPro to analyze charts from a technical perspective. However, MarketPro can do so much more, it is full of data perfect for those who seek a deeper granular level of information. There is technical information, fundamental data and self-analyzing tools available to you. You can create up to 25 layouts, utilizing 26 fully-customizable windows to essentially build your trading space, your way.

Accessing MarketPro®?

How do you access MarketPro? Merrill requires a Merrill Edge Self-Directed account in order to obtain access to Merrill Edge MarketPro®. There are no minimum trade or asset requirements. We just need to know that you are a Merrill Edge self-directed investor. There are many ways to access MarketPro. Today, I will show you one, first, select trade from the main menu, and click on Merrill Edge MarketPro®. A launch menu will pop up directing you to download the file. Now, if you are launching MarketPro for the first time, you may run into some troubleshooting. We have created a troubleshooting guide located here that will walk you through some common issues. If you run into any issues, feel free to give us a call.

Once the file downloads, you will click it to launch MarketPro.

Setting up your workspace

Now that we have MarketPro launched, let's walk through customization and creating your view. There are a lot of resources within MarketPro that we are going to show you. First, is the welcome guide. When you launch MarketPro for the first time you are presented with this welcome guide, it essentially asks and answers the frequently asked questions that we receive when clients are first getting started with the platform. Like setting up watch lists, charts, themes and so on. If you do not see this document, you can access by selecting help and clicking on getting started. Within the welcome guide you can view an extensive online overview, which provides full descriptions of the breadth of the platform and five additional two to three minute videos on customization. These are a few important resources to help you with your set up of MarketPro. Now let's get into the platform.

The platform is set up in a tabular format that are essentially your various layouts. By default, you will see pre-defined layouts that are catered to a broad audience. You can change these layouts to anything you like. If you would like to re-name a layout simply right click on the layout and select rename. Here you can also delete the layout. If you want to re-order the layouts, simply drag and drop. The workspace allows up to 25 layouts.

Each layout contains windows or widgets. The various widgets available to you are found underneath the layouts, here. The list of widgets adjust to your screen size, click this drop down arrow to see the remaining widgets. You can click on a widget to launch a floating window, which is helpful if you have multiple screens. Or drag and drop it into the selected layout below. You can also customize your view of this top section. By clicking on view, you can add or remove tools that would appear on the top section. Like the widgets toolbar, market news, quote ticker, and the snap quotes. Here is where you can change the color scheme and font size as well.

Now I am going to show you how to create a new layout. First, click the plus sign next to the existing layouts. Let's rename this layout: custom layout. Now, we have four empty windows. We can make a selection from the tools displayed or select more to see a full list of the widgets available. We can drag the edge of the windows to resize. Or exit out of them completely. I am going to exit out of all of the windows less one.

Let's go ahead and add a chart to this layout. There are many customization elements within the chart, which we will cover in a few moments. Let's add a watchlist to the right of the chart. I am going to do this by right clicking on an empty space, click on new, select watchlist and select to the right. I can fill the watchlist by manually typing in symbols or I can select from the drop down menu a watchlist from an already saved workspace, from an online watchlist, a position list or the server symbol list. I am going to select the market overview from the server symbol list. If you want to further customize your watchlist, you can right click on a column header, select insert column, and choose from the vast amount of columns available. If you want to select multiple columns, hold down control and click. Just as the layouts can be dragged and dropped, so can the column headers.

Here is a great tip: Right clicking within the workspace will open up the preferences or most edit features. If you are looking to customize anything in MarketPro begin with right clicking and you will most likely find a customization menu.

Let's add a detailed quote window to this layout. This time I am going to drag and drop the detail quotes widget directly underneath the watchlist. Just as we can add columns to the watchlist, we can right click on an empty field and add additional data points.

Lastly, I want to link this quote window with the chart widget. Simply click on the link icon on the upper right hand side of the window. You will notice this icon on every window, we can link together all of the widgets or a selection of widgets by color. Let's link snap quotes, the chart and the detailed quote to red. Now if I type in the symbol for the Dow Jones Industrial Average for example, the Dow Jones displays in the chart and the detailed quote. If you want the inverse to happen, meaning change a symbol from another window other than the snap quotes, you will need to specify that window as a broadcast source. You can do this by clicking on the link icon and choosing symbol broadcast source from the drop down menu. Now, any symbol in context on this widget will populate in all linked red widgets across the workspace.

Trading in Merrill Edge MarketPro®

Now that we know how to set up the work space, let's talk about how to trade in MarketPro. There are many ways to place trades in Merrill Edge Market Pro®. All trades link to and launch the trade widget. The trade widget is located at the bottom of the screen. You can keep this docked to the bottom of the workspace or float the window. It's important to note that you can only have one trade window open at a time.

The trade window is separated by trade ticket type, for example to trade stocks or ETFs click on Stock slash ETFs, this will open the equity trade ticket. You can even customize your trade ticket to default certain values. To access the customization window, right click on an empty space and select trade default and properties. Here you can create customized views for each trade ticket. For example purposes, let's customize the equity ticket. You can specify a default order type, let's select limit. You can also choose a default duration, a fixed number of shares, and even default the limit price to always be on the bid, ask or last. For example purposes, let's select a daily duration and a quantity of 100 with every buy limit order to be at the ask price and sells at the bid price. This is also where we would specify the default trading account. Once you are done with these changes, which do vary by trade ticket type, go ahead and click ok.

There are many ways to open up the trade ticket across the platform. You can even set up a hot key. To set up hot keys, go to tools, expression short cuts, and select hot keys and gestures. You can actually set up a hot key for many features across the platform within this menu. For the trade ticket, select the category trade, and then Stock/ ETFs. Click in the type new shortcut key field or draw a gesture field to assign your hotkey. In this example, let's assign the trade widget to the equals key, click assign, and then apply and ok once finished. Now, all we need to do is hit the equals key to launch the equity trade ticket with all of our defaults displayed. You can also trade anywhere you see a price or quote by right clicking and selecting buy or sell. You can even do this on a chart by right clicking on the plot.

Customizing your charts

Let's look at chart customization. In this get technical series, we focus on the use of charts. We start with the basics of technical analysis and introduce the use of drawing tools and studies over the course of the series. It's important to know where these tools are so you can apply what you learn throughout this series. I'm going to create a new lay out that consists of a chart only. I'll call this layout 'chart view'. Let's exit out of the windows we do not need and select the chart widget in this remaining empty window.

On the upper left hand side of the window, we can enter a symbol and adjust the time frames. Let's keep SPX and adjust the time frame to one year with daily intervals. Next, let's change the chart type. I am going to click on the plot type menu here and change the chart to a candlestick plot. To add an indicator or study select the studies button. You can hold control and click to select multiple studies. I am going to add a moving average and RSI. You can resize the panes like this. If you want to modify an indicator or study, right click it and select study properties. Here you can change the color, style and data elements, simply use the drop downs or adjust the fields to customize. I am going to change the moving average period to 50 days and to a blue dotted line. You can modify all of your studies in this window by using this navigation pane. Select apply to update your changes and select okay once you are complete.

Drawing tools are located here. You can use these tools to plot your own support and resistance, trend lines, notes and so much more that we will explore throughout this series. For example purposes, let's draw a level line. Select the level line icon and click where you want to draw the line. Make sure you click the selection icon to exit drawing mode, otherwise a horizontal line will appear wherever you click. If you want to remove a line, right click it and hit remove. You can do this with the indicators as well.

Helpful navigational tips

Marketpro is a fully customizable platform, which means that there are many windows and customization features available. Therefore I want to leave you with a few tips and resources. First, the help tab, here you can find our getting started resource with frequently asked questions, troubleshooting guide and other helpful resources. Second, is the question icon. This icon is located on every widget and provides a comprehensive toolbar guide inclusive of full navigational features of that widget. If you are wondering what something means or are looking for a specific feature, this toolbar guide may have the answer. And last, if you are trying to modify a timeframe or a setting of some sort, start with right clicking on what you are trying to modify. Right clicking on the platform will direct you to a preferences window where you can further customize MarketPro, your way.

As you explore MarketPro you will come across a wide variety of tools and resources beyond technical analysis. Thank you for taking the time to educate yourself on Merrill's platform. We encourage you to continue the series and watch our next webinar titled: The essentials of technical analysis. Where we will put our charting tools to work. Please feel free to give us a call with any questions or concerns at 877.653.4732. Also, we would love to hear from you. We welcome any feedback or question in regard to today's presentation as well as suggestions for future webcasts. Fill out the have a question box at the bottom of this page. On behalf of the Merrill Team, thank you.