

Watchlist – your ultimate tool for tracking stocks and funds



Have you tried Globe Investor's **Watchlist**? It is a tool both novice and advanced investors can use to track stocks, mutual funds, exchange-traded funds, indexes, commodities and currencies.

We launched it late last year and have been busy making improvements and adding new features, many of them suggested by our readers.

GlobeInvestor.com/watchlist

The new Watchlist is better than our old tools, the old-style Stocklist and Fundlist, in many ways.

The screenshot displays the 'MY WATCHLIST' page on the Globe Investor website. It features a search bar at the top, navigation tabs for 'Stocks and ETFs (24)' and 'Funds (7)', and a detailed table of tracked assets. Each asset entry includes a ticker symbol, current price, daily change, volume, 52-week range, a 5-day price chart, and a link to the latest news. The interface is clean and organized, with a 'NEW Watchlist goes mobile' banner.

1. Watchlist goes where you are. It is now available on mobile devices.

2. No more lost Stocklists and Fundlists. Over the years, we've had thousands of people call us to complain that they've lost their Stocklists and Fundlists. That's because the old lists used cookies, which are tiny files stored on a computer. Cookies are easily erased and can't be transferred between computers. The new Watchlist is registered with our site so you can't lose it.

3. Simple import and export functionality. You can easily import your old-style Stocklist or Fundlist into Watchlist in a few simple steps. Or you can export your Watchlist to a spreadsheet.

4. Multiple lists within Watchlist. You can create dozens of individual lists within your Watchlist, with up to 200 items per list. For example, you can create one list called Bank Stocks, then another one for technology stocks and then another one for mutual funds.

5. See the big picture. The old-style tools forced you to see stocks in one place and funds in another. Now you can create lists that combine stocks and funds, as well as ETFs, indexes, commodities and currencies. For example, you can create a list called Mining that combines mining stocks, funds and commodity prices.

6. Customization. We have many different views for stocks: Overview, Ratios, Dividends, Earnings, All News and Per Cent Performance. You can also customize it to suit your needs using Build Your Own View from more than 60 different data points.

7. My Shares. You can enter how many shares of stocks or ETFs you own and track your gains and losses daily.

How to set up your watchlist

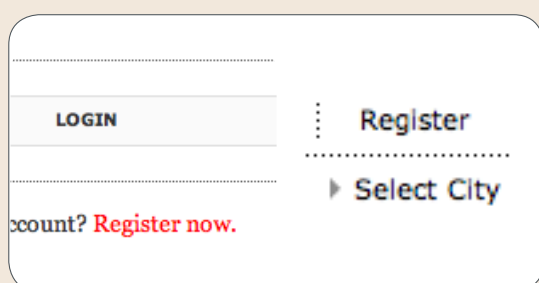


One advantage of **Watchlist** is that it goes where you are. Once you have registered, you can see it from any computer and it is now available on mobile devices.

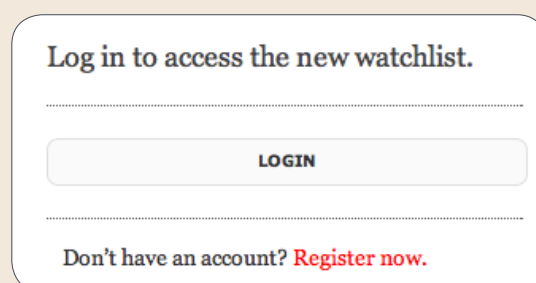
GlobeInvestor.com/watchlist

Registration also means no more lost Stocklists and Fundlists, which we have received thousands of complaints about over the years. That's because the old lists used cookies, which are tiny files stored on a computer. Cookies are easily erased and can't be transferred between computers. The new Watchlist is registered with our site, so you can't lose it.

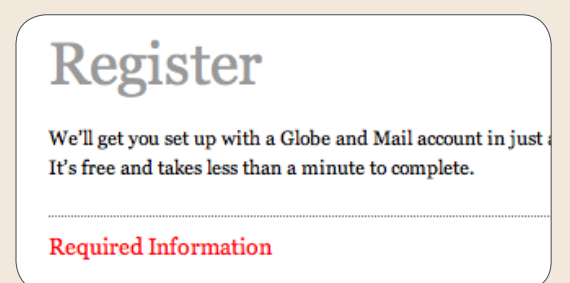
Here is how to register and start lists:



1. You can get to the Globeand-mail.com registration page from either the Watchlist introduction page GlobeInvestor.com/watchlist or by clicking Register in the upper right corner of every globeandmail.com page.



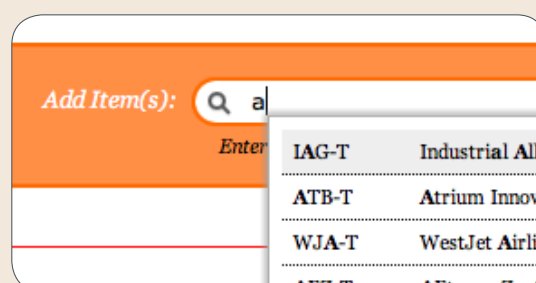
2. If you've already registered with Globeandmail.com, then you can simply log in.



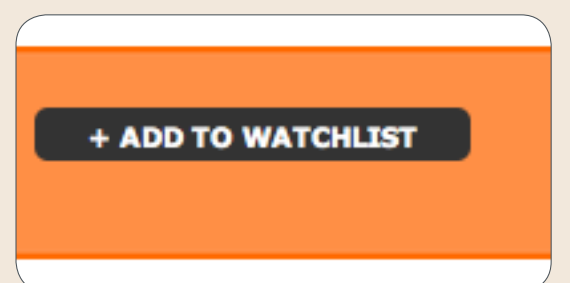
3. If you're registering for the first time, fill out the required fields.



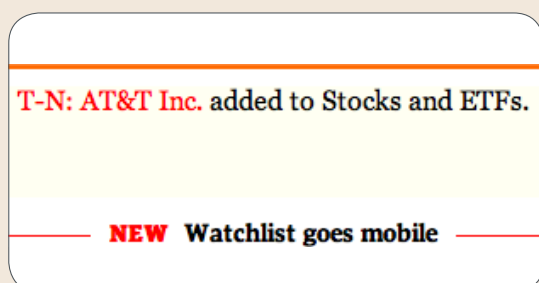
4. Once complete, you will either be prompted back to Watchlist or you can get to Watchlist by looking under the Investing heading.



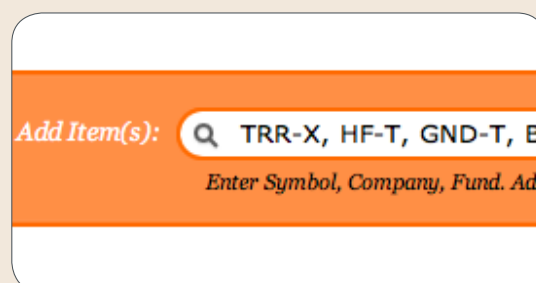
5. Start typing the stocks or items you want to add to your first list in the search box and see suggestions for what you're looking for.



6. Select the item you want and hit Enter or the Add to Watchlist button.



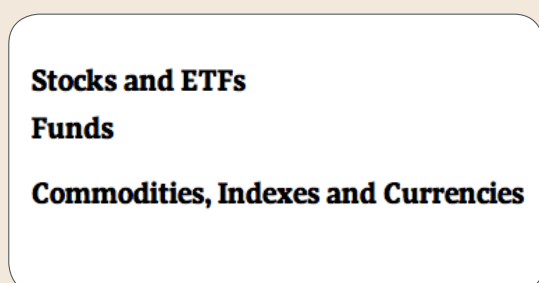
7. When you've added an item to the list, you can see a message saying you've been successful.



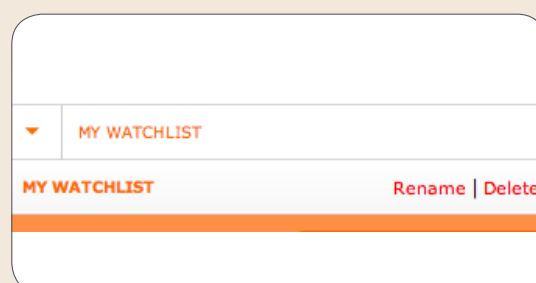
8. You can add multiple items by inserting a comma between them.



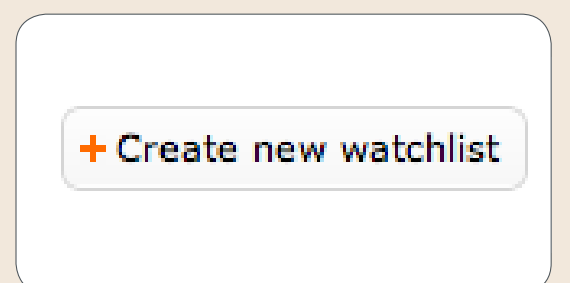
9. If you added the wrong item, the delete buttons for each item are on the far right of your list. Type the name of the item or the ticker and see suggestions as to what you're looking for.



10. Each list will be divided into three different areas – Stocks and ETFs in one group, Funds in another and Indexes, Commodities and Currencies in a third.



11. When you've finished adding all the items you want, you can name your list. You can also rename the list or delete it in the future from here.



12. You can create as many new lists as you want by clicking the Create a New List button.

How to import and export lists

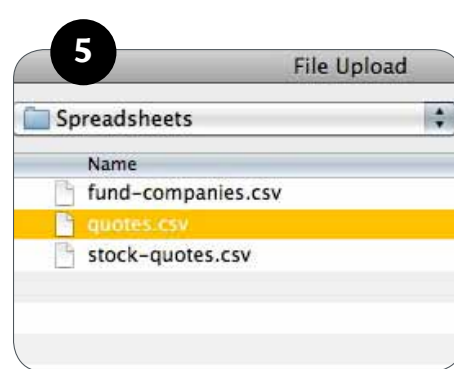


It is easy switch to Watchlist from our old-style tools, Stocklist and Fundlist. Once you've registered, you can import your lists of stocks and funds in few simple steps. You can also import from other tracking tools at the Yahoo!Finance, Bloomberg, Reuters and Forbes sites.

GlobeInvestor.com/watchlist



1. Hit the Import to/Export data button.

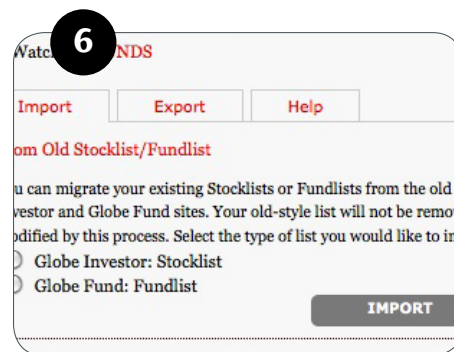


5. After you've saved it on your computer, browse to find the file.

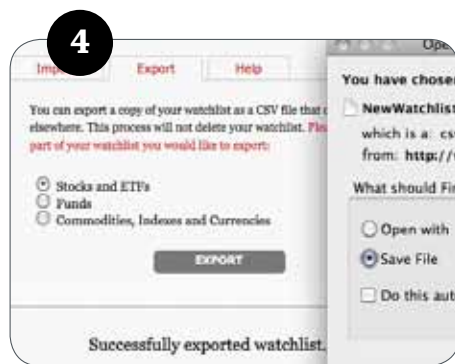


2. Choose to either import from your old Stocklist or Fundlist, or from another site.

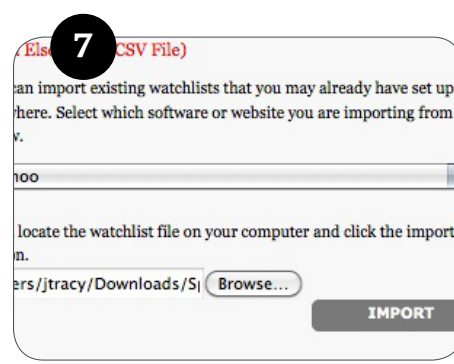
3. If you choose Stocklist or Fundlist, it will import items automatically and you'll get a message saying it worked.



6. Click on the correct file and then press Import.



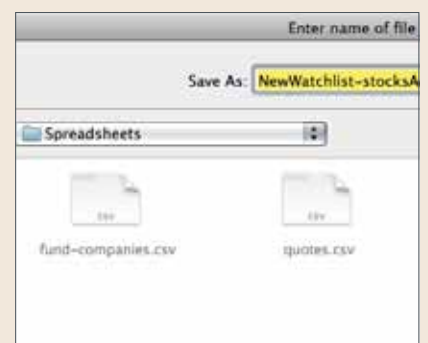
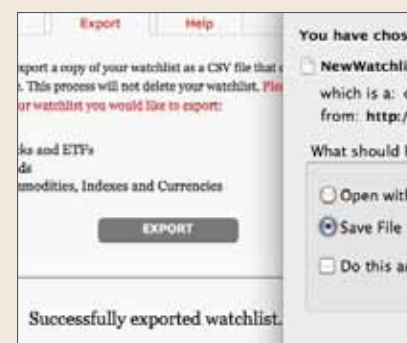
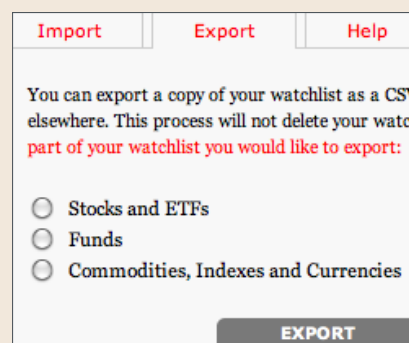
4. If you choose to import from another site, such as Yahoo!Finance or Bloomberg, it will ask you to save the list on your computer. Remember where you've saved it.



7. You'll get a success message when it is imported.

Tip: Your old-style Stocklist or Fundlist must be on the computer you are using to import into Watchlist. That is because the old-style tools use cookies, which are small files that store computer information.

Quick & Easy Tip: Here is how to export your Watchlist



1. To export, hit the Export data button in the top middle of the page.

2. You will be asked to export either Stocks and ETFs, Funds or Commodities, Indexes and Currencies. Make your choice.

3. Next you will be asked to Open or Save. If you just want to view the data, hit Open.

4. If you want to save it on your computer, hit Save. Then choose a place to save it on your computer and name the file. Then you can open the Excel file to view it.

Tip: A lot of people like to print their Watchlists. The best place right now to do this is from Excel, where you can choose the font and size of the print yourself.

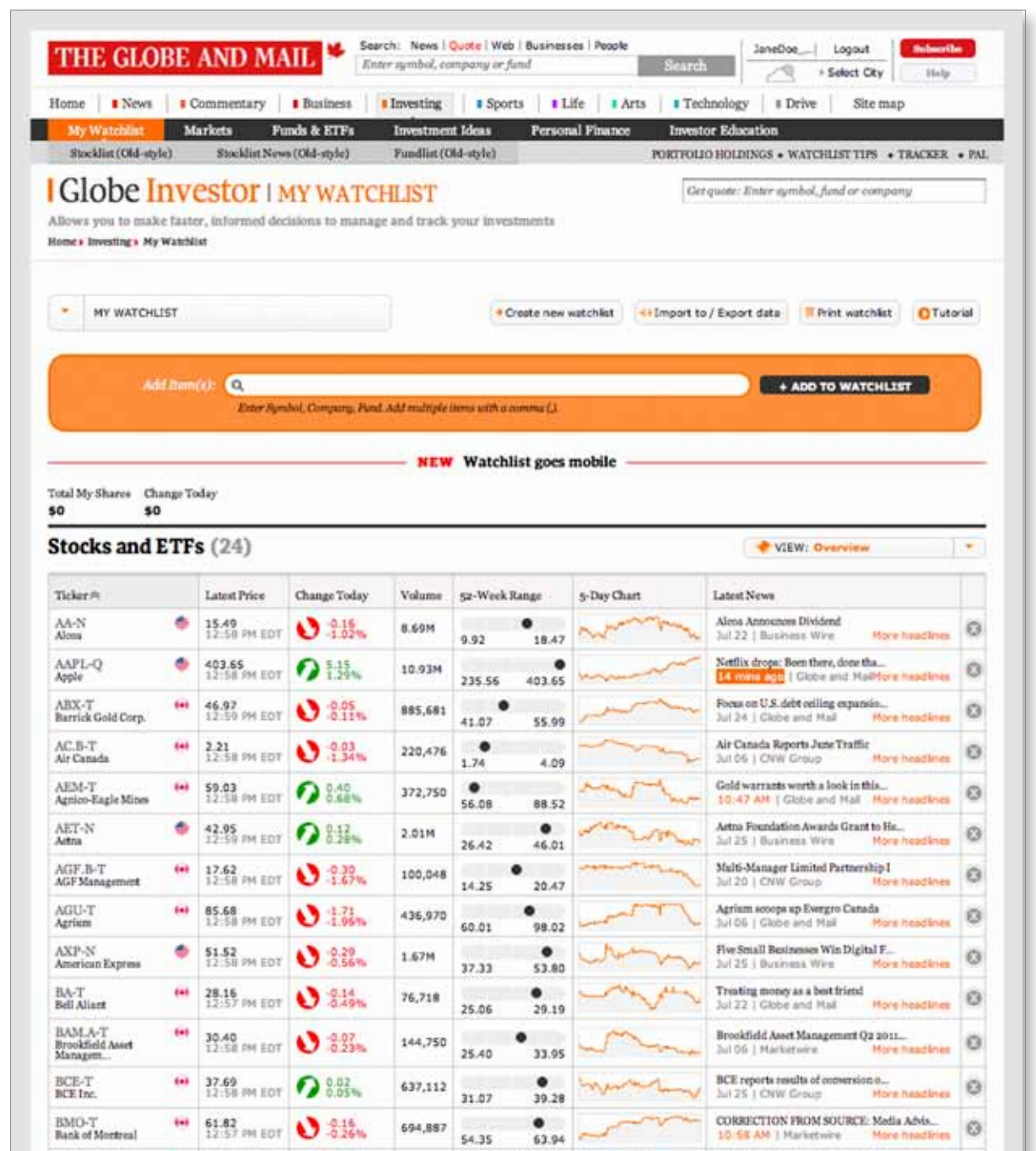
How to find your lists and create new ones



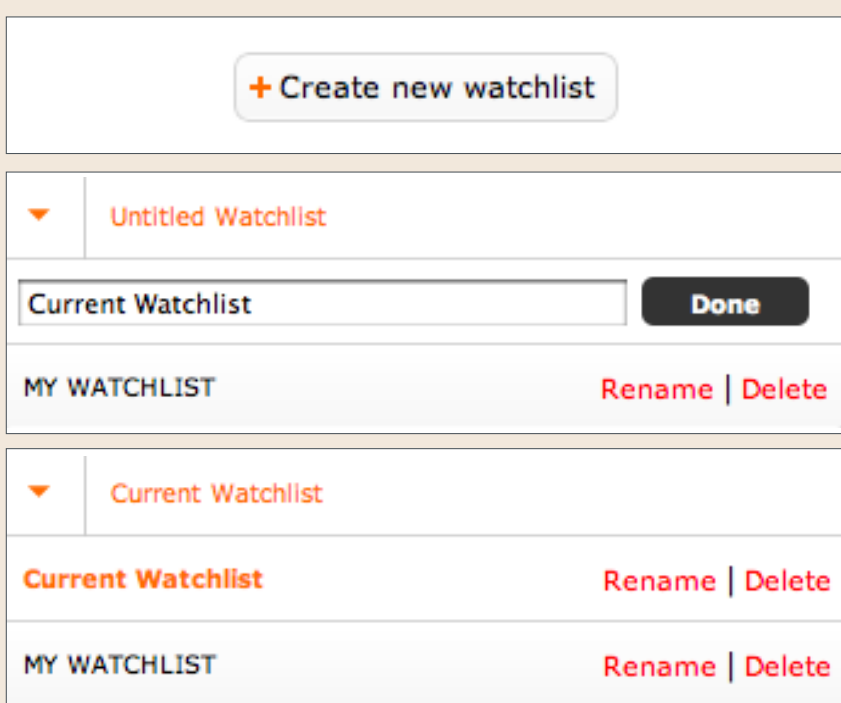
Watchlist gives you the flexibility to create multiple lists to track your investments. You can create as many lists as you want and name the lists whatever you like. This is a great advantage over the old Stocklist and Fundlist tools because it allows you to create and personalize lists in the fashion of your choosing instead of being limited to one list.

You can find it at GlobeInvestor.com/watchlist

For example, you can create one list called Bank Stocks, then another one for technology stocks and then another one for mutual funds.



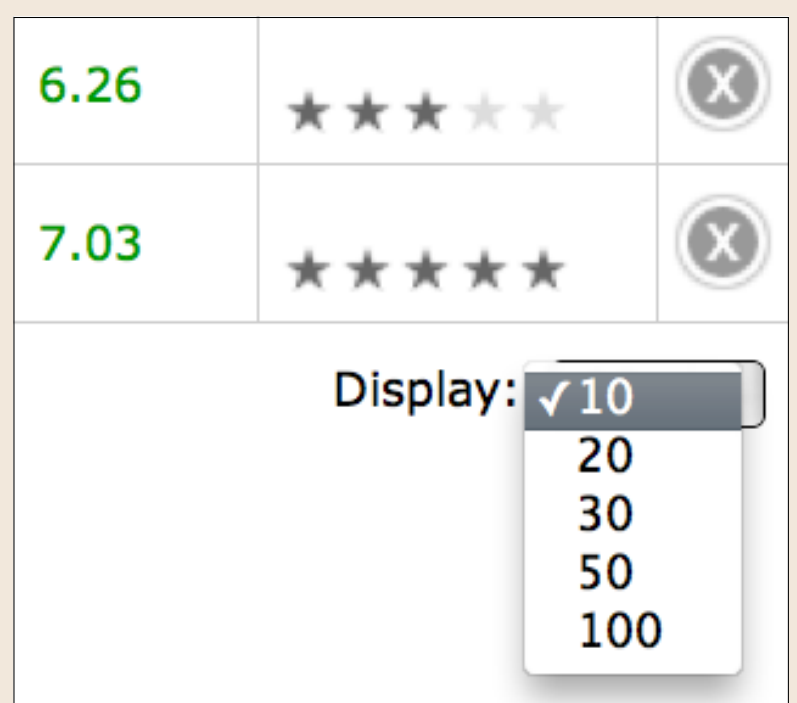
Quick & Easy Tip: Creating a list



To create a new list, click the button at the top of the Watchlist page.

You will be given an option to name the list. Name it and then select Done.

If you want to delete a list or rename a list, select either option.



Hint: Some people like long lists of data and like to scroll down pages. Other people like shorter lists. You can customize the length of each list by using the Display dropdown at the bottom of the list. Most browsers allow you to choose between 10, 20, 30, 50 or more items for the list.

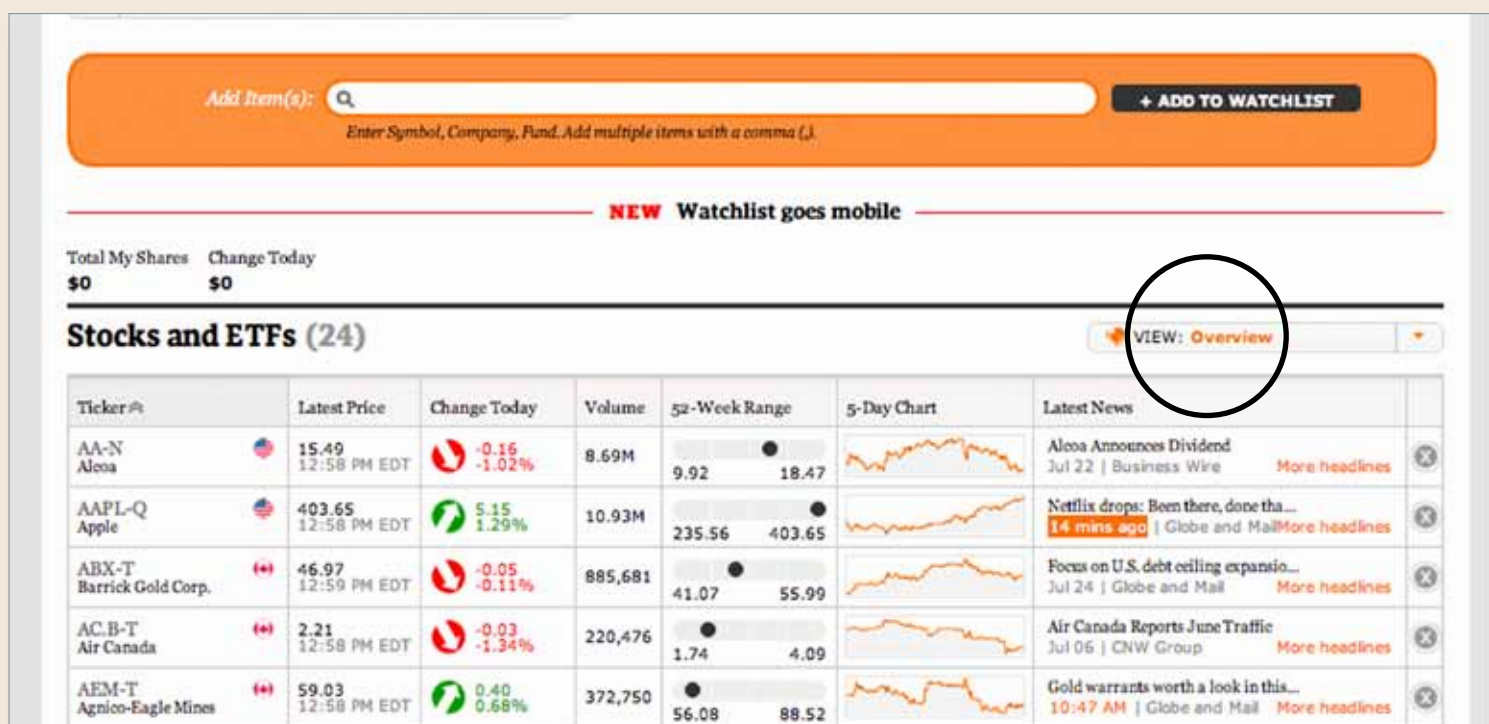
Change what you see on each list



You can customize the data your Watchlist shows by picking from dozens of data points for stocks, funds, commodities, indexes and currencies. Change the view of each list with the View dropdown in the upper right corner of each list.

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If you are unsure what a data term means or want to find out how it is calculated, hover over the header for an explanation.



This is what we offer in each view for stocks:

- » Overview: Latest price, Change today, Volume, 52-week Range, 5-day Chart and Latest News
- » Ratios: Latest price, Change today, PE ratio, Forward PE ratio, Price-to-book ratio, Market Capitalization, Beta, PEG ratio and Debt-to-equity ratio
- » Dividends: Latest price, Change today, Dividend per share, Yield, Dividend payout ratio, Dividend growth 1 year, Dividend growth 5 years, Total return 1 year and Total return 5 years
- » Earnings: Latest price, Change today, Earnings, EPS, Profit growth 1 year, Profit growth next quarter, Profit surprise last quarter, Operating margin and Return on equity
- » All News: The latest journalism and press releases for all items in that list.
- » My Shares: Latest price, Change today, Volume, Number of shares you own, Today's value, Today's gain/loss, Latest news
- » Per Cent Performance: Latest price, Change today, 5-day change, 1-month change, 1-year change, 3-year total return, 5-year return and 10-year return
- » Build Your Own: Choose from over 60 data points and sort them in any order you like.

For funds, this is what we offer in each view:

- » Overview: Latest price, Daily change, Net Assets, MER, 1-year chart, Year-to-date change %, 1-year change %, 3-year return % and Star rating
- » Cumulative change: Latest price, Daily change, 5-day change, Month-to-date change, 1-month change, 3-month change, 6-month change, year-to-date change and 1-year change
- » Cumulative return: Latest price, Daily change, 1-year return, 3-year return, 5-year return, 10-year return, 15-year return, 20-year return and Return since inception
- » Year-by-year Return: Latest price, Daily change, Year-to-date return, Quartile ranking year to date, 2010 return, Quartile ranking 2010, 2009 return, Quartile ranking 2009, 2008 return and Quartile ranking 2008

For indexes, currencies and commodities, we offer an Overview with: Latest price, Change today, Volume, 52-week range, 5-day chart and Latest news

How to sort columns

Sorting items in the Watchlist is easy. Simply click on any column heading in any view of the Watchlist. The data under the column heading you have clicked will sort alphabetically or numerically. The first click will sort in ascending order and the second click will sort in descending order. Sorting helps to organize the information in your Watchlist.

You can find it at GlobeInvestor.com/watchlist



The Watchlist has a built-in feature to automatically save your preferences. Sorting is one of those preferences. It will automatically save the last sorting option you have clicked. If you change to a view where the column that you previously sorted by is not longer shown, the sorting preference will default to the company name column.

Quick & Easy Tip: Sort all columns

Company	Company	Today	Volume	52-Week Range	5-Day Chart	Latest News
LLL-T	Libidson athletic		n/a	16.555 - 41.88		Funds with strong
XRE-T	Shares S&P/TSX		n/a	12.80 - 15.25		FirstService may be
XPN-T						BlackRock Annou

VIEW: Overview

- Overview
- Latest News
- Ratios
- Dividends
- Earnings
- Funds with
- All News

52-Week Range

53.14 88.52

23.74 69.30

All the columns in every view of your Watchlist can be sorted. Click once on a header and it will sort the list from top to bottom. Click on it again and it will sort from bottom to top.

This will allow you to sort your list of securities by data, alphabetically, and even by Latest News.

Want to find out which stocks are trading closest to their 52-week highs? Click on the 52-Week Range column header and the list will be sorted by stocks closest to their highs. Click on it again to sort from the ones nearest their lows.

Hint

1. Some Watchlist readers like to sort items by ticker and some by company name. Go to the header of the column called Company. Click once and it will sort by company name alphabetically A to Z. Click again and it will reverse from Z to A. Click again and it will sort by ticker A to Z. Click again and it will sort by ticker Z to A.

7.03

★ ★ ★ ★ ★

Display: 10

20

30

50

100

2. Some people like long lists of data and like to scroll down pages. Other people like shorter lists. You can customize the length of each list by using the Display dropdown at the bottom of the list. Most browsers allow you to choose between 10, 20, 30, 50 or more items for the list.

Finding more details and charts



You can click on several items in your Watchlist to find more information.

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1

Company	Latest Price
AEM-T Agnico-Eagle Mines	53.14 Jul 29
RIM-T Research In Motion	23.93 Jul 29
YHOO-Q Yahoo!	13.01 1:33 PM EDT
YLO-T	2.08

1. For more on a stock, ETF, fund, index, currency or commodity, click on the name of the item.

2

Agnico-Eagle Mines AEM TSX Precious Metals	
Latest Price: 53.14 c\$	Change: -- --
Volume: --	Jul 29, 2011 4:57:17 PM
TSX data delayed 15 minutes.	
Summary	Chart
Open: --	Previous Close: 53.14

2. When you click on a stock's name, you get to the stock profile pages where you can also get charts, financial history, analyst ratings and estimates, and more news.



5. Another way to find a large, interactive and comparative chart on each item is to click on the 5-day chart. On a large chart, you can look back at an item's performance up to 10 years or, in some cases, further back. You can also compare this item to another one in a chart and look at 30 days of specific price history.

3

Canadian Dollar/U.S. Dollar CAD/USD Index	
Latest Price: 1.04	Change: -0.003 -0.32%
Volume: --	Aug 1, 2011 1:00:01 PM
Index data in real time.	
Summary	Chart
Open: 1.05	Previous Close: --
High: 1.05	Low: --

3. When you click on an index or currency, you can find more information about the index members, index performance, sub-sectors, get a large interactive and comparative chart and more news.

6

VIEW: Overview

Latest News

These stocks refuse to follow the c...
Jul 28 | Globe and Mail [More headlines](#)

RIM embeds BBM in work and play apps

6. In Watchlist, you can also click on the headlines you see under News to read the full article or press release.

4

TD High Yield Bond-I	
Fund Price: \$6.26 (as at July 29, 2011)	1-day chg: \$-0.003378 -0.05% YTD
Summary	Chart
Open: --	Previous Close: --
High: --	Low: --

4. When you click on a fund name, you get the fund profile page, which shows more information about the fund manager, historical performance, top holdings and other important research points.

7

More headlines

7. Or click on More Headlines to see a recent list of all headlines for that item.

Quick & Easy Tip: Adding to your Watchlist

1. You don't have to be viewing your Watchlist to add items to it.
2. Many of our readers like to research stocks on our stock profile pages.
3. On each of these pages, you can click on a button in the upper right corner called Add to Watchlist.
4. Next, you can choose the list within your Watchlist where you want the item to appear.

How to customize a view in Build Your Own

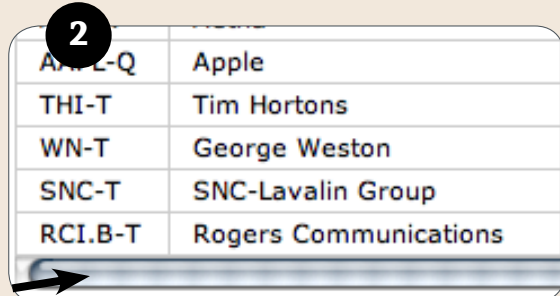


Each investor is different and wants to evaluate investments with different data. That's why we offer the Build Your Own view.

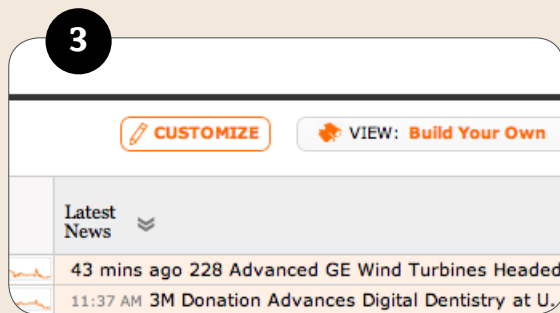
You can find it at GlobeInvestor.com/watchlist



1. First, look for the Build Your Own view in the views dropdown at the top right of the Stock and ETFs layer of one of your lists.

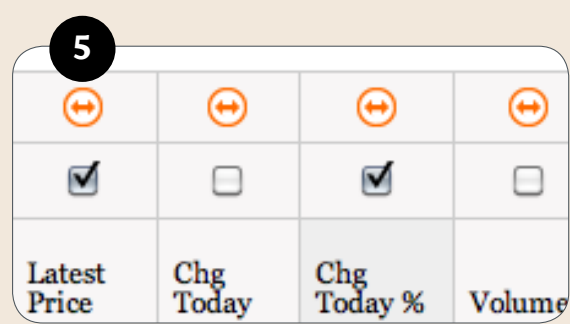


2. There are more than 60 different data points to choose from. You can see them all by using the scroll bar at the bottom of the list.

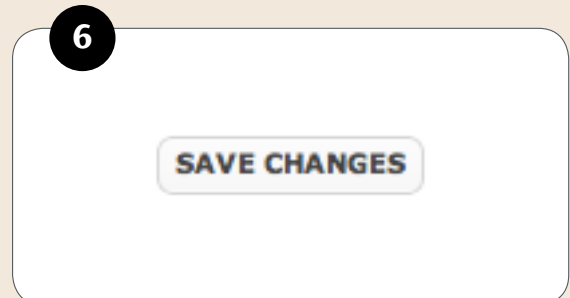


3. To start picking the ones you want, click on Customize.

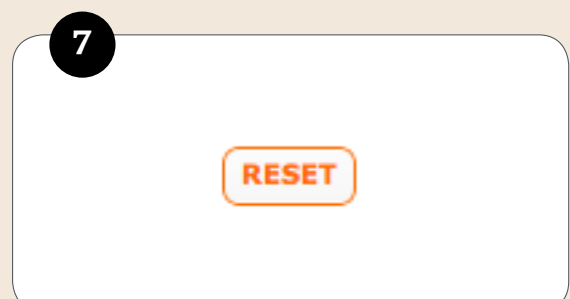
4. You can change the order of the columns by clicking and holding down the Reorder Columns icon. Move the icon horizontally left or right. When it is in the right spot, release your mouse.



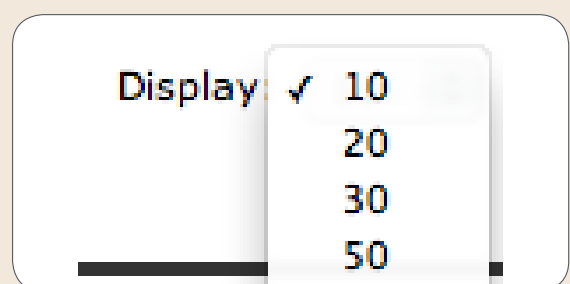
5. If you want to hide a data item from being shown, leave the box blank at the top of the column.



6. When you've finished ordering your items, hit Save changes.



7. If you want to start from scratch on the Build Your Own view, go to Customize and then hit Reset. This will restore the Build Your Own view to the default setting.



Hint: Some people like long lists of data and like to scroll down pages. Other people like shorter lists. You can customize the length of each list by using the Display drop-down at the bottom of the list. Most browsers allow you to choose between 10, 20, 30, 50 or more items for the list.

Track your portfolio: How to use My Shares



You can enter how many shares of a stock or ETF you own and get the daily price performance for each of your holdings. Watchlist also calculates your total daily gains and losses.

You can find it at GlobeInvestor.com/watchlist

1. First, go to My Shares in the view dropdown.

2. To enter your holdings, go to the Shares column.

3. Click on the cell and enter the number of shares you own. You can also edit the number of shares you own here.

4. The Today's Value of your holdings and Today's Gain/Loss should fill in automatically. It will be updated to today's trading price during trading hours. If it is after trading hours, then it will update with the last trading day's change.

5. Your total gains and losses for the day across all your stock and ETF holdings will also now be displayed in the upper left area of your Watchlist.