StockWatcher

Version 1.00

About StockWatcher:

StockWatcher is a simple to use Internet utility for keeping track of your stock portfolio. It updates prices on the stocks of your choosing via the Internet, automatically. All that you need is your Macintosh and an Internet connection.

You simply enter the ticker symbol, number of shares, and price per share; StockWatcher does the rest—constantly updating your portfolio's value all day long. You have instant access to your portfolio's value whenever you want.

System requirements:
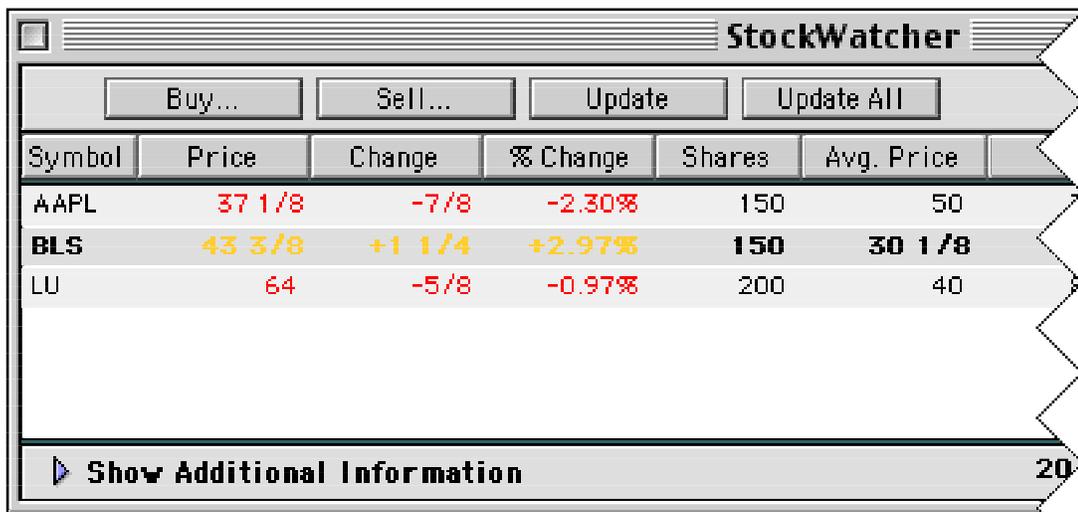
To run StockWatcher you will need:
- A PowerMacintosh running MacOS System 8.0 or later
- An Internet connection.
- One megabyte of available space on your hard
- At least two megabytes of free memory (RAM) when you launch StockWatcher.

NOTE: StockWatcher can be run with System 7.6 & Apple's Appearance extension but it is not rigorously tested in this configuration.

Starting StockWatcher:

To use, simply double click on the StockWatcher icon. (I know it is not a very good icon, I'm open to suggestions.) The StockWatcher window will open on your screen. (Fig. 1) Now you are ready to start entering all the information on the stocks you own.

Symbol	Price	Change	% Change	Shares	Avg. Price
AAPL	37 1/8	-7/8	-2.30%	150	50
BLS	43 3/8	+1 1/4	+2.97%	150	30 1/8
LU	64	-5/8	-0.97%	200	40

Figure 1—StockWatcher Window

StockWatcher Window Buttons:

At the top of the StockWatcher window there are four Buttons. They are **Buy…**, **Sell…**, **Update**, and **Update All,** respectively.
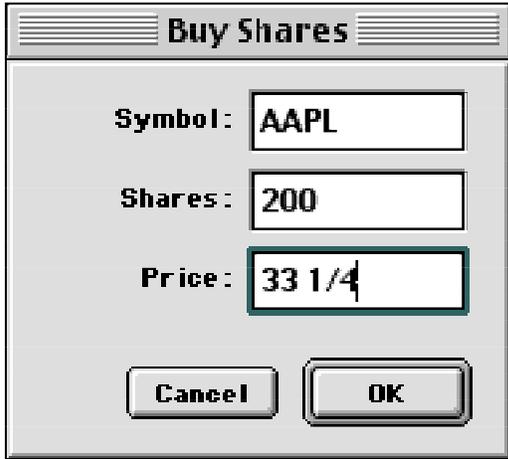
Pressing the **Buy…** button will bring up the buy shares dialog, allowing you to enter or update a stock. Pressing the **Sell…** button will allow you to remove or alter a stock you already own.

While StockWatcher will update automatically if you so desire, there may be times when you want to *force* an update from the Internet. That's what the next two buttons are for. **Update** will get new price information from the Internet for whichever stock is selected in the list. **Update All** will update all the stocks in the list.

NOTE: All four buttons have menu items in the Actions menu with the same names. They both do the same thing.

Buying Stock:

You can add a stock to your portfolio by either pressing the **Buy…** button in the StockWatcher window or by selecting the **Buy…** menu item in the **Actions** menu. When you do this, the Buy Shares dialog will be displayed. (Fig. 2)

In the Buy Shares dialog you enter the ticker symbol, the number of shares that you own, and the price per share paid for this stock. When you press the **OK** button it will be entered into the StockWatcher window to be continuously updated.

Figure 2—Buy Shares Dialog

If you make another purchase of a stock that you already own you simply enter it as a new transaction. When you buy more of a stock at a different price, remember that StockWatcher will do the work of calculating the new average price per share. You simply enter the price you paid in this new transaction.
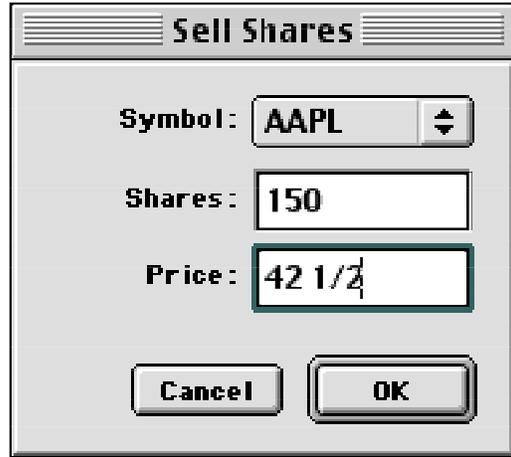
*NOTE: You enter the **price per share** NOT the total transaction price.*

NOTE: Whenever you are asked to enter a price you can enter as a fractional number (1/2, 1/4 1/8 etc) or decimal number (.5, .25, .125, etc).

Selling Stock:

When you sell a stock that you have listed in your portfolio select that stock in the StockWatcher window by clicking on it. (It will become hilighted. Fig. 1.) Then press the **Sell…** button or select **Sell…** in the **Actions** menu. When you do this you will be presented with the Sell Shares dialog. (Fig. 3)

It will already have the symbol and the number of shares held entered in the appropriate fields. If you sold all of the shares that you held, you simply need to enter the price you sold at and press the **OK** button. You can sell part of your holdings by changing the number in the shares edit box.

Figure 3—Sell Shares Dialog

If you are selling all the shares that you held, the stock will be removed from the StockWatcher window automatically. If you still hold some shares, the number of shares held will be changed accordingly—as will all the values associated with that stock.

NOTE: You can not sell more shares than you have listed (selling short is beyond the scope of this program).

Viewing Additional Info:

At the bottom of the StockWatcher window is the disclosure triangle for Additional Info (Fig. 4). To toggle between showing and hiding the Additional Info pane click on the triangle. The additional info pane (Fig. 5) will show more information about whatever stock is selected in the StockWatcher list. To display the additional information for a different stock just click on the stock you would like to view.

Figure 4—Additional Info Trangle

NOTE: If the Internet has not yet been polled for price information no additional information will be available.
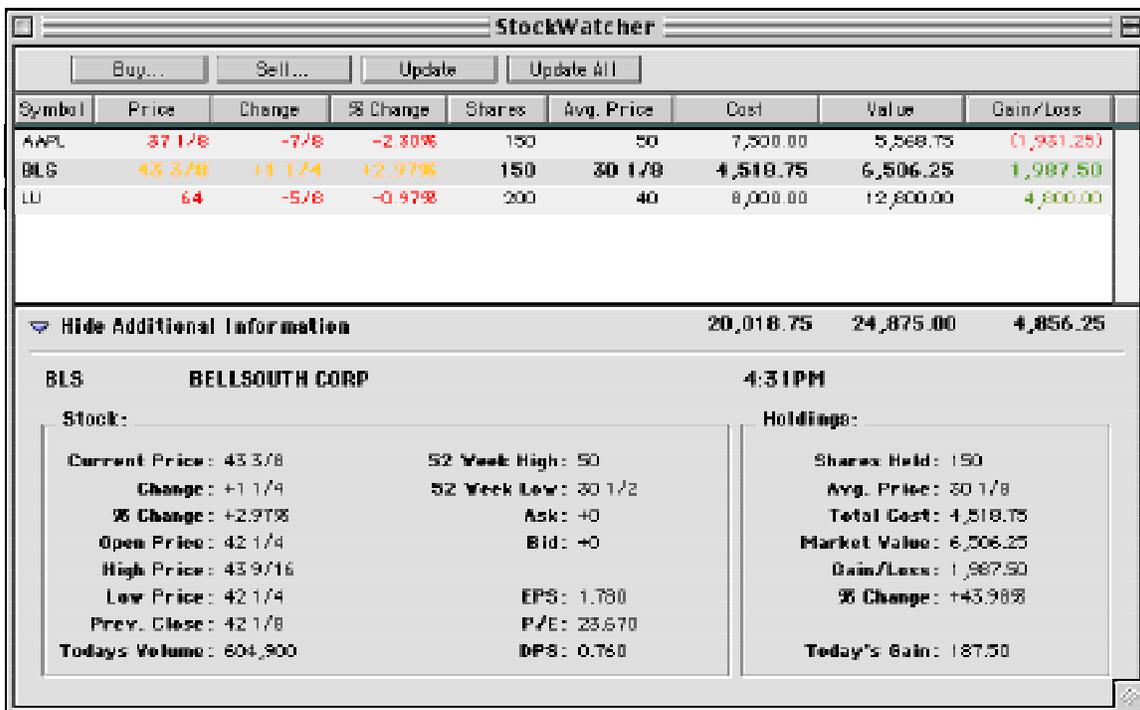

Figure 5—Additional Info Exposed

Preferences:

StockWatcher has several user configurable options that you can change from the preferences dialog (Fig. 6). To display the preferences dialog, select **Preferences…** from the **Edit** menu.

The preferences dialog has two panes. **Sources** (Fig. 6)—which allows you to change information about where and how often you get new stock updates; and **Colors** (Fig. 7)—which allows you to change the colors in the StockWatcher list.

You can switch between the two panes by clicking the appropriate tab that the top of the dialog.
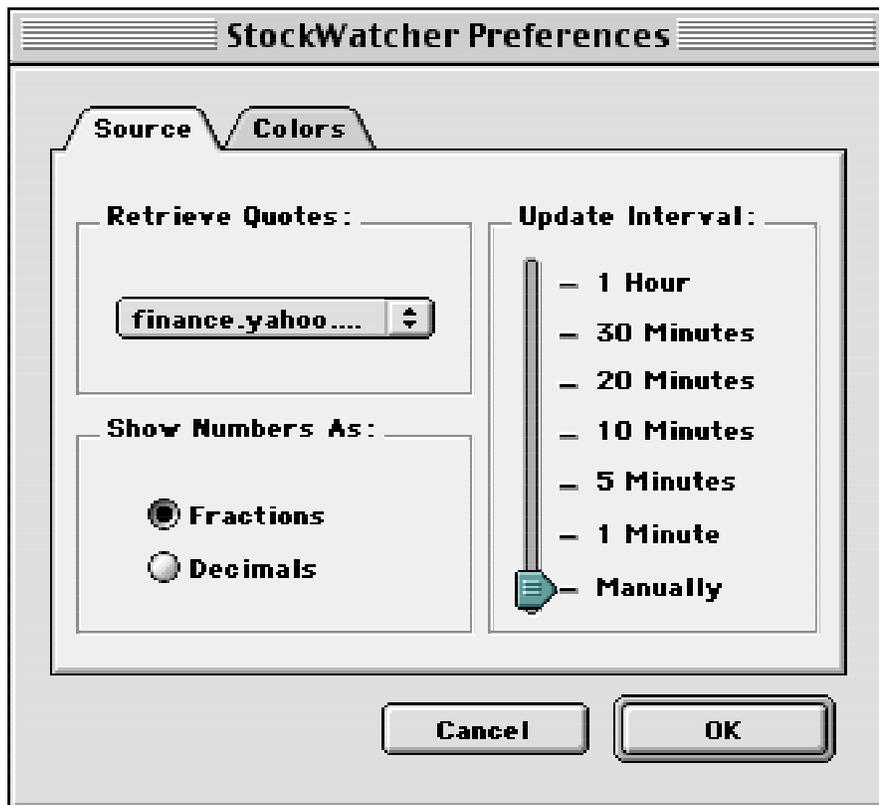

Figure 6—Preferences Dialog.

Sources Pane:

In the Sources pane (Fig. 6), you can select where you would like to retrieve quote from. The current choices are finance.yahoo.com, investor.msn.com, and fast.quote.com. You can pick one of these three from the popup menu.

NOTE: In future versions of StockWatcher more internet stock sources will be added.

You can also configure how to display numbers—fractions or decimal. Fractions will show numbers in the traditional stock format (ex. 24 1/8), decimal will show them in the standard decimal notation (ex. 24.125).

NOTE: Fractions will be displayed down to 1/64 intervals. Past that StockWatcher will use decimals regardless of the setting.

Finally, the Sources pane allows you to set how often the Internet will be polled for new prices. Manually will only check prices when you press the **Update** or **Update All** buttons.

NOTE: StockWatcher defaults to polling for new prices manually. This is done so that people with dial-up Internet access will not have the phone start dialing when they first launch StockWatcher.

Colors Pane:

The Colors pane (Fig. 7) allows you to alter the colors that numbers will appear in the StockWatcher window's stock list. To change any color click on it and a color picker dialog will appear.
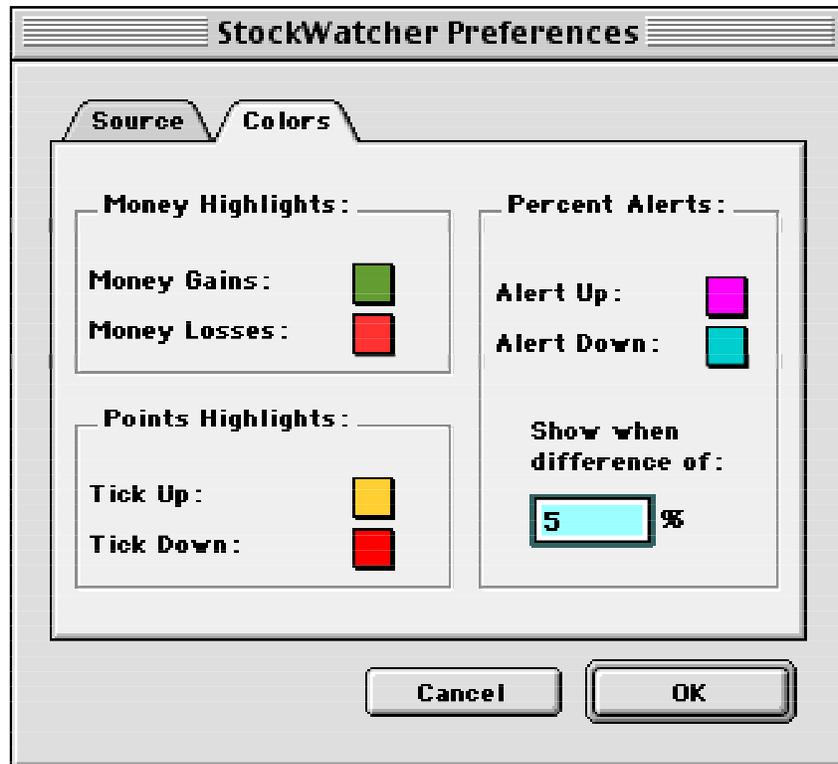

Figure 7—Colors Pane.

It is broken down in to three different kinds of hilights—Money, Points and Percent.

Money highlights will be used if your dollar amounts are gaining or losing. Point highlights are used if the point values are gaining or losing. And percent highlights are used if your investments are up or down by a specified percentage.

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