



BMO Wealth  
Management  
BMO InvestorLine

# BMO Active Trader Quick Reference Guide

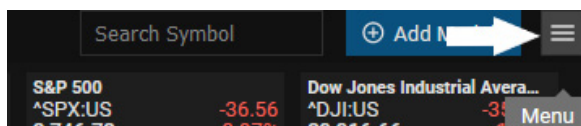


# Dashboard

The Dashboard includes charts, watchlists, quote details, news, and your portfolios. It's completely customizable, with a drag and drop functionality that lets you easily align new windows to the default workspaces.

## 1 Menu Bar

The **Menu Bar** is located at the top right of the dashboard. It includes features such as Additional Tools, Help Documentation, **Manage Alerts**, and **Customize Settings**.

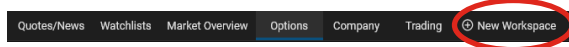


## 2 Workspace Bar

The **Workspace Bar**, located at the top left of the application, is a workspace menu that provides easy access to all workspaces. Here you can also create, delete, rename, and duplicate workspaces

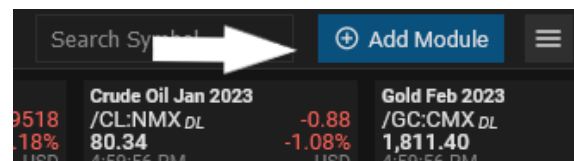
### Create a Workspace

1. On the Workspace Bar, click on the **plus (+)** sign.
2. A text box will appear where you can enter the name of the new workspace.
3. Click the checkbox beside to save.



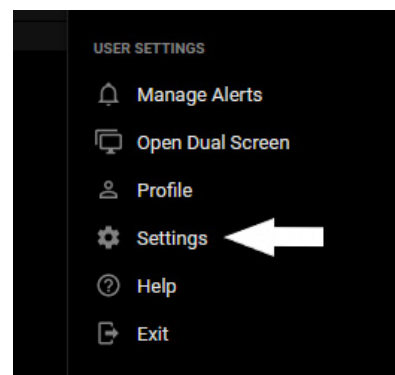
### Add Modules to a Workspace

1. At the top right of the dashboard, click **Add Module**.
2. A dropdown menu of available modules will appear. Using your mouse, hover over the module you want to add.
3. Left click, hold and drag and drop the module to the location in the workspace where you want it.



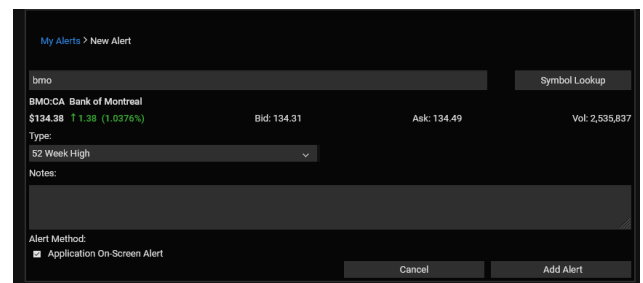
## 3 Settings

The **Settings** function allows you to set your preferences. Here you can choose your theme, language, single click action, session timeout default and much more. Access the **Settings** function through the Menu Bar.



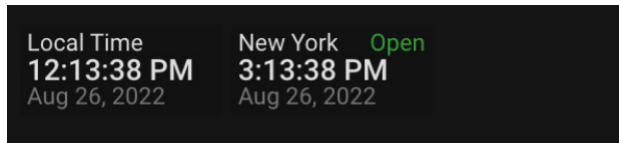
## 4 Manage Alerts

1. Click on **Manage Alerts** in the menu bar to open the modal.
2. Click on **Add Alert** at the top right of the modal.
3. Choose your symbol.
4. Click on the dropdown menu beside **Type** to choose the type of alert you want to receive.
5. Choose your Alert Method and click on **Add Alert**



## 5 Symbol Banner

The **Symbol Banner** includes a local clock, an exchange clock, and a list of your favorite symbols displayed at the top of the application for easy viewing. The banner is customizable and can be enabled or disabled.

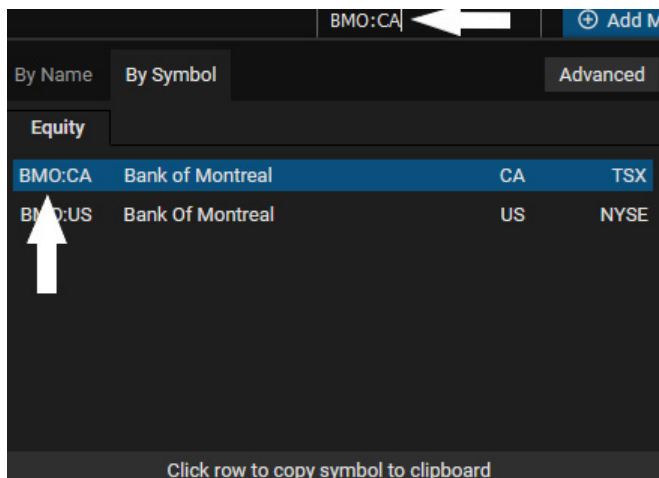


MSFT	-8.53	AMZN	6.035	GOOG	-5.565	CSCO	-1.073	AAPL	-5.173
270.32	3.05%	131.245	4.40%	112.135	-4.73%	46.197	-2.27%	164.657	-3.04%
2:18:31 PM	USD	11:43:31 PM	USD	3:18:24 PM	USD	2:18:21 PM	USD	2:18:31 PM	USD

## 6 Symbol Search

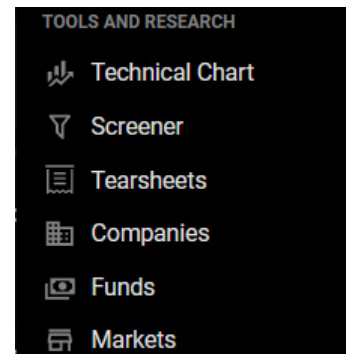
The **Symbol Search** function is located at the top right of the dashboard.

1. Search a company by either name or symbol by entering in the first few letters.
2. A dropdown of possible matches will appear and will update as you type.
3. Find the company in the list and click on it.
4. This will automatically copy the symbol to your clipboard, and you can paste in your chosen module.



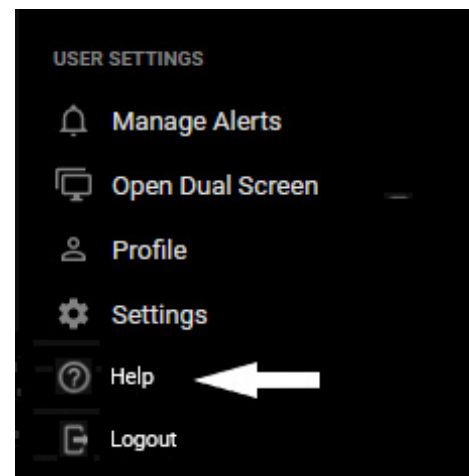
## 7 Additional Tools

Additional tools such as the **Research Modals**, **Screener**, and **Tearsheets** can be accessed in the menu bar.



## 8 Online Help Guide

Access the full online **Help Guide** in the Menu Bar.



### Symbol Prepends

Prepended Character	Instrument Type
^	Indices
@	Options
!	Interest Rates
/	Futures
/	Spot Metals
\$	Currencies
~	Cryptocurrencies

### Symbol Suffixes

Country	Format	Example
Canada	:CA	XXX:CA
United States	:US	XXX:US

### Special Symbol Extensions NYSE/NYSE American

Category	Format	Example
Class Stock	.A:US	XXX.A:US
Pref. Stock	.P:US	XXX.P:US
Pref. Class	.PA:US	XXX.PA:US
Warrant	.WS:US	XXX.WS:US
Warrant Class	.WS.A:US	XXX.WS.A:US
Rights	.R:US	XXX.R:US
When Issued	.W:US	XXX.W:US
When Distributed	.WD:US	XXX.WD:US
Units	.U:US	XXX.U:US

### Special Symbol Extensions TSX/TSX Venture

Category	Format	Example
Class Stock	.A:CA	XXX.A:CA
Pref. Stock	.PR:CA	XXX.PR:CA
Pref. Class	.PA:CA	XXX.PA:CA
Warrant	.WS:CA	XXX.WS:CA
Warrant Class	.WS.A:CA	XXX.WS.A:CA
Rights	.RT:CA	XXX.RT:CA
When Issued	.W:CA	XXX.W:CA
Debentures	.DB:CA	XXX.DB:CA
Units	.UN:CA	XXX.UN:CA
Notes	.NT:CA	XXX.NT:CA

### Nasdaq 5th Character Definitions

5th Character	Definition
A	Class A
B	Class B
Q	Bankruptcy
R	Rights
U	Units
W	Warrants
Y	American Depositary Receipt (ADR)

### Key Market Indices

Symbol	Description
^TSX:CA	S&P/TSX Composite Index
^JX:CA	S&P/TSX Venture Composite Index
^DJI:US	Dow Jones Industrial Average
^DJT:US	Dow Jones Transportation Average
^DJU:US	Dow Jones Utility Index
^OEX:US	S&P 100 Index
^MID:US	S&P 400 Index
^SPX:US	S&P 500 Index
^COMPX:US	Nasdaq Composite Index
^NDX:US	Nasdaq 100 Index
^NYA:US	NYSE Composite Index
^NYID:US	NYSE US 100
^XAX:US	NYSE American Composite Index
^VIX:US	Cboe S&P Volatility Index
^TNX:CA	10 Yr T-Note Interest Rates
^TYX:CA	30 Yr T-Note Interest Rates

### Key Market Statistics

Symbol	Description
^ADVQ:US	Nasdaq Advancing Issues
^DECQ:US	Nasdaq Declining Issues
^TICQ:US	Nasdaq Cumulative Tick
^VOLQ:US	Nasdaq Total Volume
^TRIQ:US	Nasdaq TRIN
^ADVN:US	NYSE Advancing Issues
^DECN:US	NYSE Declining Issues
^TICU:US	NYSE Cumulative Tick
^VOLU:US	NYSE Total Volume
^TRIU:US	NYSE TRIN

## Let's connect

We're available Monday to Friday  
between 8 a.m. and 6 p.m. (ET)  
to answer your questions.



Call us  
**1-888-776-6886**



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