

# Desktop Platform User Manual

## Version 1.0

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### Logging On

Double click on the StoxPit desktop icon on your computer's desktop. In the login window following "Username", type in the Username that was sent to you via email. Next, in the login window following "Password", type in the Password that was sent to you via email. You have the option to check the checkbox that says "Remember Username and Password", located under the "Cancel" and "Accept" buttons.



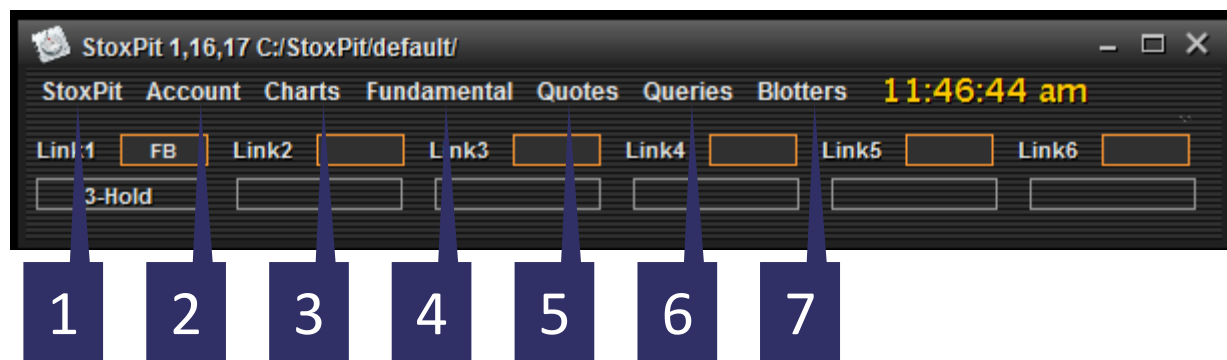
### Saving a Desktop Layout

After configuring your platform layout, you will want to save the layout for continuous use. To save your desktop layout, go to the StoxPit Master Window, click "StoxPit" on the menu bar, and then click "Save Layout". You can give your layout a custom name, then click "Accept". Now, your custom layout has been saved to your computer for future use. **PLEASE NOTE: By default your layout is saved to C:\StoxPit\**

### Opening a Saved Desktop Layout

To open one of your saved custom desktop layouts, go to the StoxPit Master Window, click "StoxPit" on the menu bar, and then click "Load Layout". You can then select from any one of your previously saved desktop layouts.

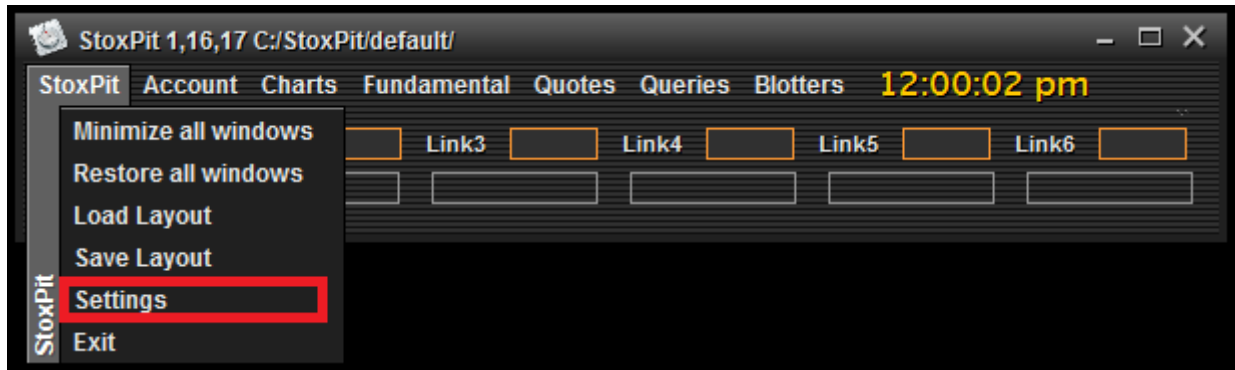
## Platform Feature Overview (Master Window)



1. **StoxPit Menu** – Overall platform settings, saved layouts, & platform window adjustments
2. **Account Menu** – Change password & fund account
3. **Charts** – Open new/blank chart
4. **Fundamentals Menu** – Company fundamentals, company profiles, & company news
5. **Quotes Menu** – Ticker search, time \* sales window, level II order window, & **PANIC BUTTON**
6. **Queries Menu** – Investment research, ratings, & information
7. **Blotters Menu** – All account/trading related windows such as open position window, executions, pending orders, & closed positions

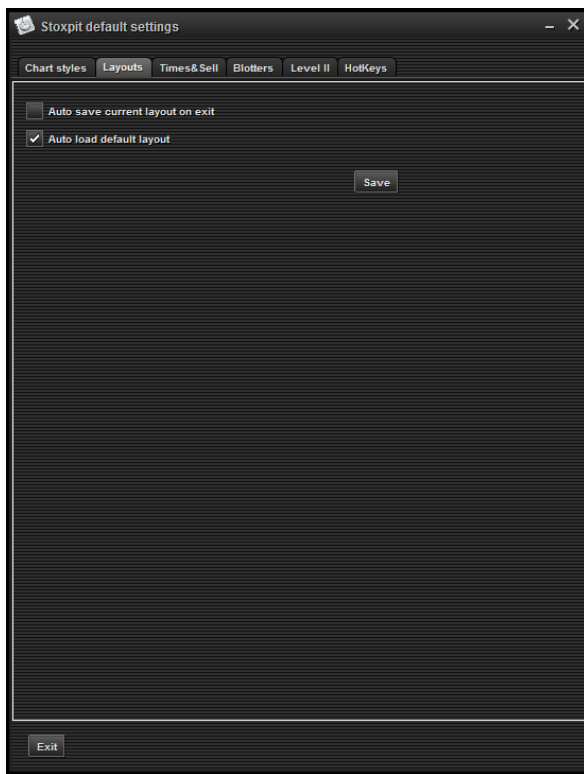
## Overall Platform Settings

To open and configure the platform settings, go to the StoxPit Master Window, click on “StoxPit” on the menu bar, and then click “Settings”. The StoxPit Default Settings window will popup, where you will be able to configure the settings for the Level II Windows, Charts, Layouts, Time & Sales, Blotters (accounts), and Hot Keys windows.



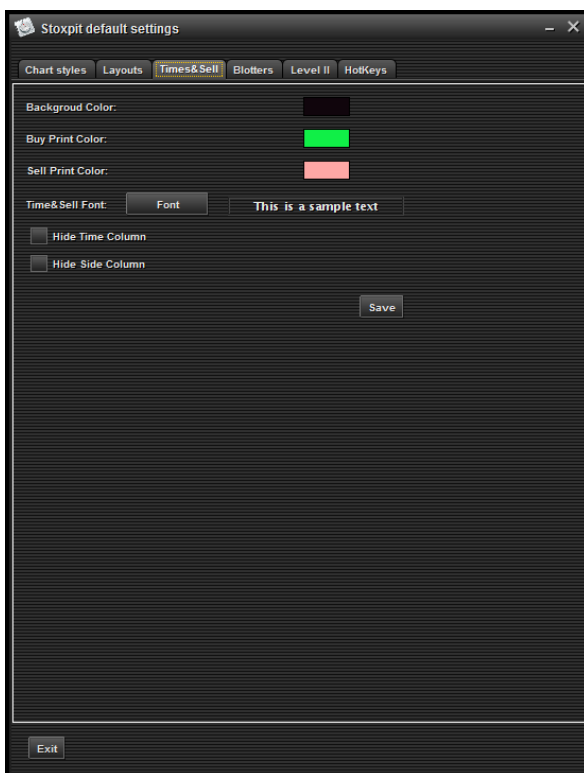
## Chart Configuration

On the chart configuration window, users can select numerous options that include chart study settings, chart type, chart color, time frames, indicators, and much more.



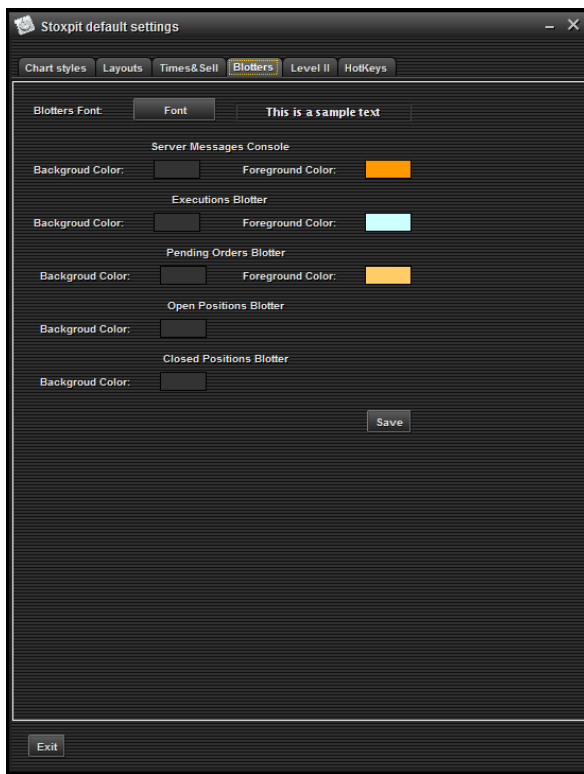
### Desktop Layouts Configuration

On the desktop layouts configuration window, users can select how desktop layouts will be loaded.



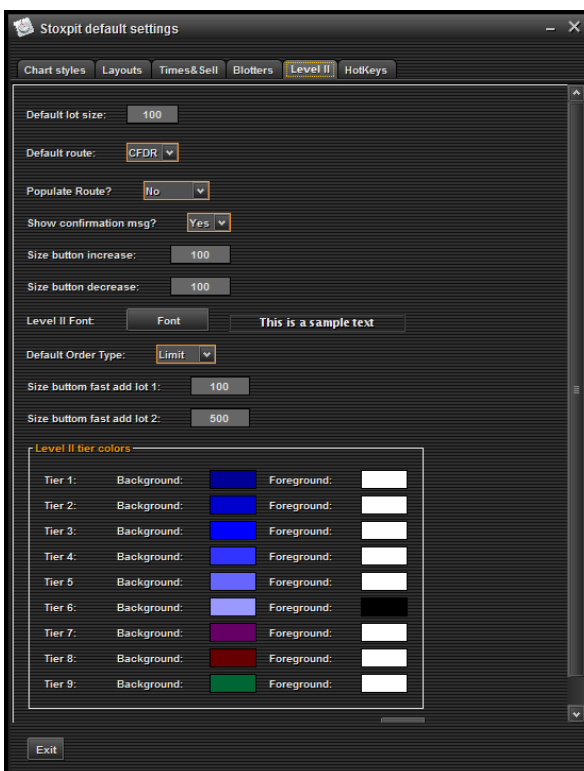
### Time & Sales Configuration

On the time & sales configuration window, users can adjust colors, column visibility, and font size.



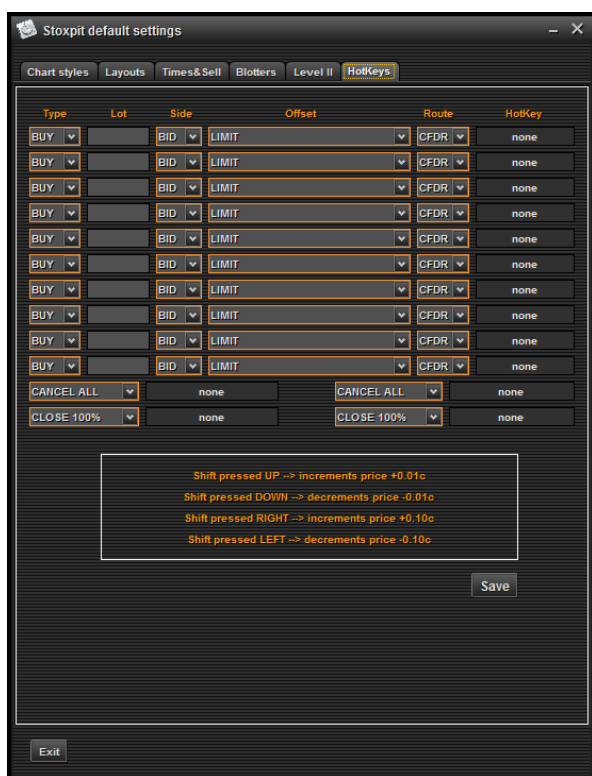
### Blotters (Accounts) Configuration

On the blotters (accounts) configuration window, users can adjust font size and color.



### Level II Configuration

On the level II configuration window, users can select default settings that include order size, default route, order confirmation popup, order default, font size, and much more.



## Hot Keys Configuration

On the hot keys configuration window, users can create custom key stroke patterns, on their keyboards, which will enable users to quickly enter trade orders with a custom, preset combination of key strokes.



## Linking Windows

The StoxPit platform gives users the ability to link all trading windows to the same ticker symbol. Linking the level II order window, time & sales windows, and charts provides users a quick and easy way to change a ticker symbol on a single window, then simultaneously updating all linked windows with the new ticker symbol/data. To link one, or multiple windows to another, simply select a corresponding number from the upper-right corner of the platform windows.

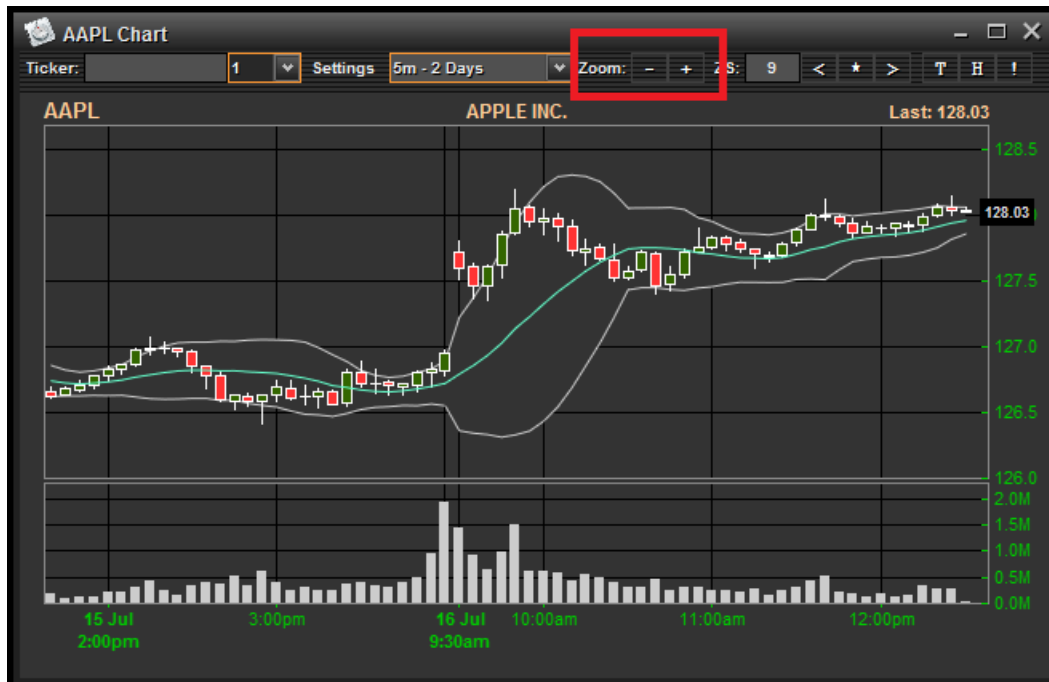


## Chart Windows

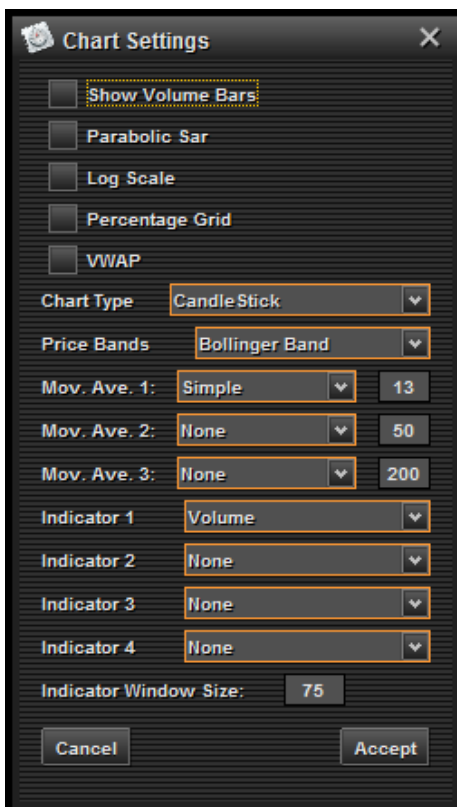
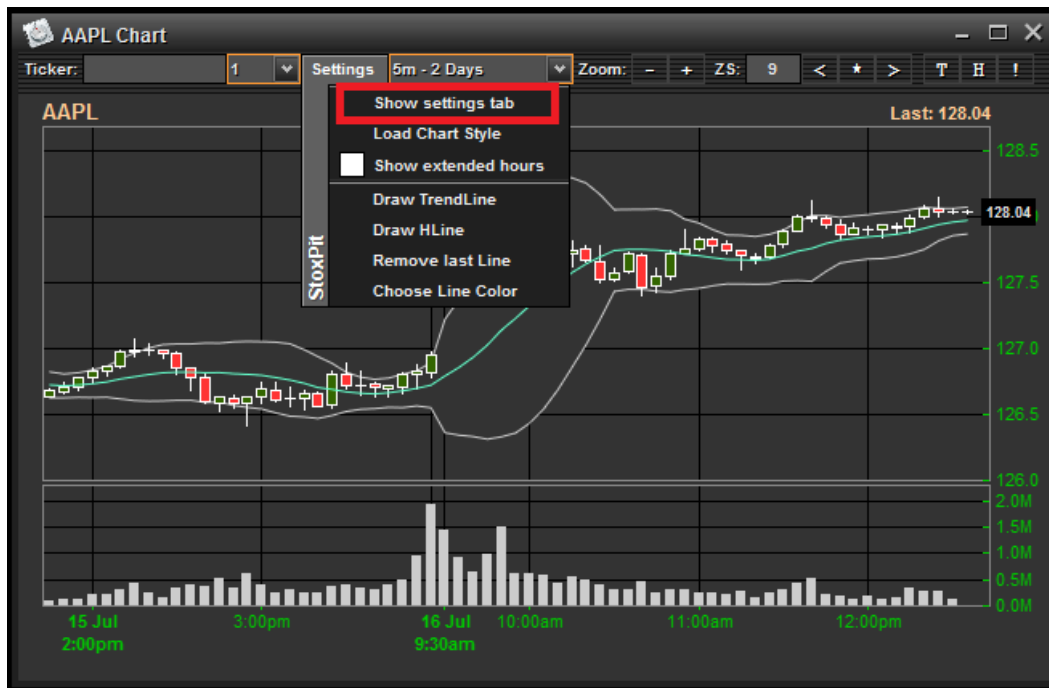
To open a new chart window, users can navigate to the “Charts” menu located on the StoxPit Master Window. Once the chart is open, users can populate chart data by typing in a ticker symbol or linking the chart window to an existing level II order window.



To zoom in and out on the chart, users can use the “-” and “+” buttons, or simply scroll the mouse wheel.



To adjust chart indicators, studies, and settings, click on the “Settings” button, and then click on “Show Settings Tab”.

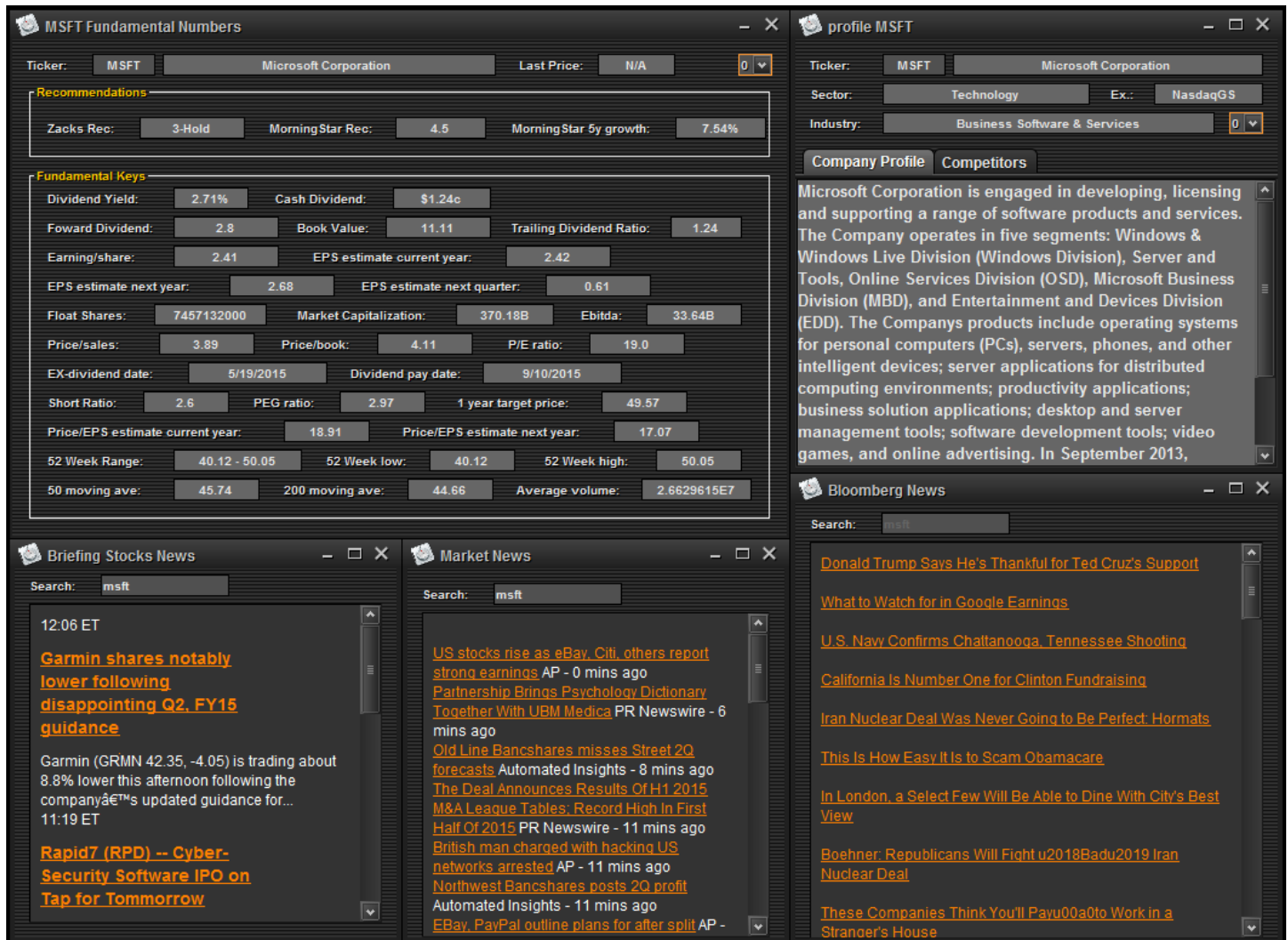


### Chart Settings Configuration Window

On the chart settings configuration window, users can select from a vast array of settings – from indicators & chart types, to window size.

## Fundamentals & News Windows

The StoxPit platform is equipped with a myriad of fundamental and news analysis tools. These tools include fundamental numbers, company profiles, stock news, market news, Bloomberg stock news, Bloomberg market news, Briefing market news, economic calendars, and Bloomberg TV. Users can select any one of these tools by navigating to the StoxPit Master Window and selecting an option from the “Fundamentals” dropdown menu.

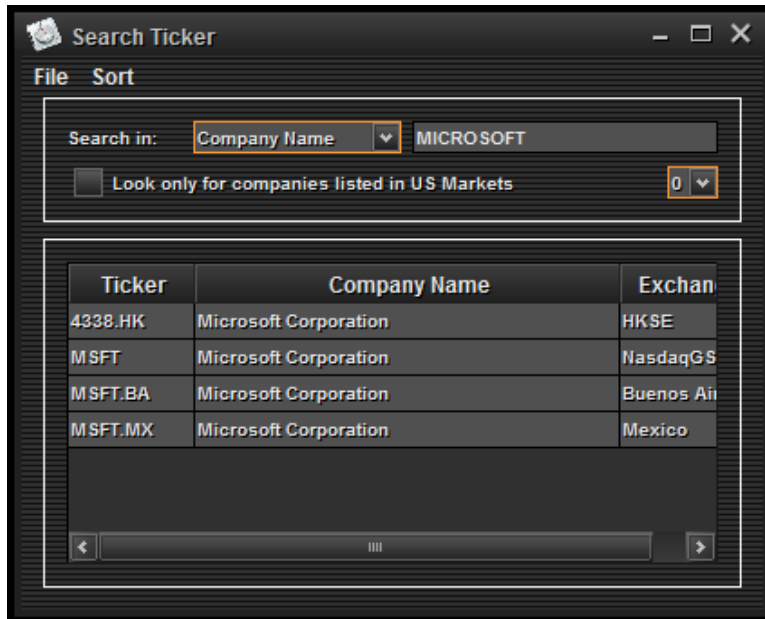


The screenshot displays four windows from the StoxPit platform:

- MSFT Fundamental Numbers:**
  - Ticker: MSFT, Microsoft Corporation, Last Price: N/A
  - Recommendations: Zacks Rec: 3-Hold, MorningStar Rec: 4.5, MorningStar 5y growth: 7.54%
  - Fundamental Keys: Dividend Yield: 2.71%, Cash Dividend: \$1.24c, Forward Dividend: 2.8, Book Value: 11.11, Trailing Dividend Ratio: 1.24, Earnings/share: 2.41, EPS estimate current year: 2.42, EPS estimate next year: 2.68, EPS estimate next quarter: 0.61, Float Shares: 7457132000, Market Capitalization: 370.18B, Ebitda: 33.64B, Price/sales: 3.89, Price/book: 4.11, P/E ratio: 19.0, EX-dividend date: 5/19/2015, Dividend pay date: 9/10/2015, Short Ratio: 2.6, PEG ratio: 2.97, 1 year target price: 49.57, Price/EPS estimate current year: 18.91, Price/EPS estimate next year: 17.07, 52 Week Range: 40.12 - 50.05, 52 Week low: 40.12, 52 Week high: 50.05, 50 moving ave: 45.74, 200 moving ave: 44.66, Average volume: 2.6629615E7
- profile MSFT:**
  - Ticker: MSFT, Microsoft Corporation
  - Sector: Technology, Ex.: NasdaqGS
  - Industry: Business Software & Services
  - Company Profile: Microsoft Corporation is engaged in developing, licensing and supporting a range of software products and services. The Company operates in five segments: Windows & Windows Live Division (Windows Division), Server and Tools, Online Services Division (OSD), Microsoft Business Division (MBD), and Entertainment and Devices Division (EDD). The Company's products include operating systems for personal computers (PCs), servers, phones, and other intelligent devices; server applications for distributed computing environments; productivity applications; business solution applications; desktop and server management tools; software development tools; video games, and online advertising. In September 2013,
- Briefing Stocks News:**
  - Search: msft
  - 12:06 ET: **Garmin shares notably lower following disappointing Q2, FY15 guidance**  
Garmin (GRMN 42.35, -4.05) is trading about 8.8% lower this afternoon following the company's updated guidance for...  
11:19 ET: **Rapid7 (RPD) -- Cyber-Security Software IPO on Tap for Tomorrow**
- Market News:**
  - Search: msft
  - US stocks rise as eBay, Citi, others report strong earnings AP - 0 mins ago  
Partnership Brings Psychology Dictionary Together With UBM Medica PR Newswire - 6 mins ago  
Old Line Bancshares misses Street 2Q forecasts Automated Insights - 8 mins ago  
The Deal Announces Results Of H1 2015 M&A League Tables: Record High In First Half Of 2015 PR Newswire - 11 mins ago  
British man charged with hacking US networks arrested AP - 11 mins ago  
Northwest Bancshares posts 2Q profit Automated Insights - 11 mins ago  
EBay, PayPal outline plans for after split AP -

## Quotes Windows

On the StoxPit Master Window, the “Quotes” menu is where users can find the ticker symbol search tool, time & sales, watchlist, level II trading window, and alerts feature.



### Search Ticker Window

Use the search ticker feature to search for a company’s ticker symbol, exchange, & associated subsidiaries.



### Time & Sales Window

The time & sales window is used to view purchases & sales of stock. Users typically link this window to the level II order window to better see sales on the BID & ASK quotes.

WL rt watchplus1408459728175.wls

File Sort

Ticker:  0   Alerts

X	Ticker	Last ...	Bid	Ask	Volume	Net Ch...	%
X	SPY	211.93	211.92 x 64	211.93 x 32	54124086	1.320	
X	QQQ	111.56	111.55 x 55	111.56 x 148	13855521	1.180	
X	HD	114.98	114.97 x 3	114.98 x 5	3270161	-0.600	
X	FB	90.494	90.48 x 8	90.5 x 9	14055671	0.734	
X	IBM	170.84	170.83 x 6	170.85 x 2	1934877	2.310	
X	F	14.5	14.5 x 590	14.51 x 324	19959966	-0.250	
X	SIRI	3.87	3.87 x 2580	3.88 x 1715	11275985	0.030	
X	LVS	54.71	54.71 x 2	54.72 x 2	1611926	0.260	
X	POT	28.98	28.97 x 21	28.98 x 15	2151309	-0.120	
X	DIS	110.055	110.05 x 4	110.07 x 8	2854202	0.755	

### Watchlist Window

Create unlimited custom watchlists, as well as stock-price alerts.

MSFT Level II

MSFT | MICROSOFT CORP  0

Last: 46.37 Open: 46.01 High: 46.54

Spr: 0.01 Vol: 14758082 Low: 45.965

MM	Price	Size	MM	Price	Size
NSDQ	46.37	35	NSDQ	46.38	28
ARCA	46.37	22	ARCA	46.38	17
PHLX	46.37	19	PHLX	46.38	11
EDGA	46.37	9	BATS	46.38	8
BATS	46.37	9	EDGA	46.38	7
BATY	46.37	4	BATY	46.38	6
NQBX	46.37	2	EDGX	46.38	3
AMEX	46.37	1	AMEX	46.38	2
EDGX	46.37	1	NQBX	46.38	1
GSCO	46.33	1	GSCO	46.41	1

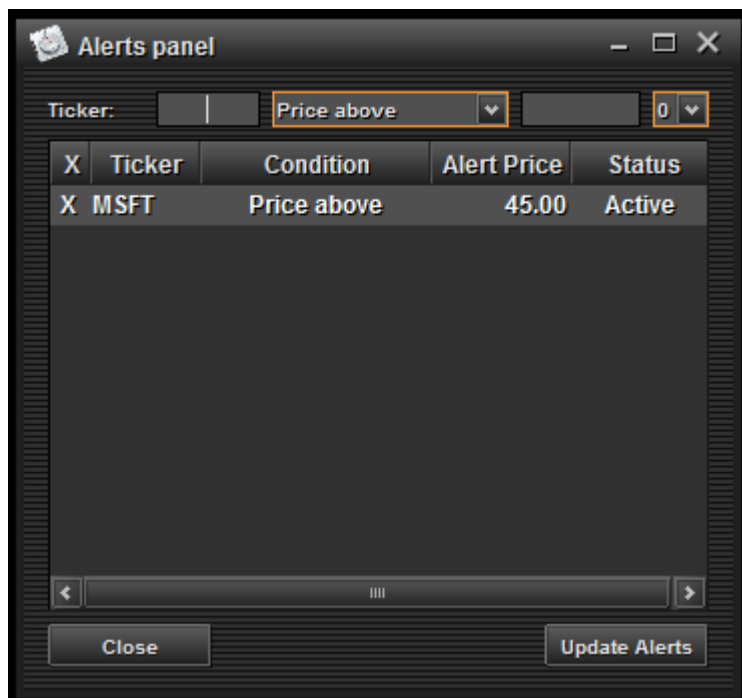
Lot: 100  Price:   CFDR

100 500 Limit

SELL CANCEL BUY

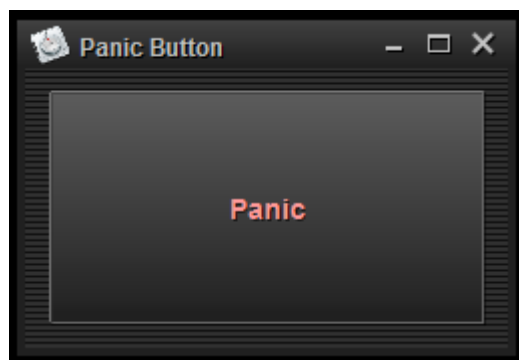
### Level II Order Window

The level II order window provides level II price quotes, volume, open, high, low, close, and order entry and trade execution features.



### Alerts Window

Create unlimited stock-price alerts in the alerts window.



### Panic Button Window

Users can use the panic button to exit and close all open trades simultaneously, with one-click of the panic button.

## Queries Windows

The queries windows provide users with Zacks Buy and Sell recommendations, as well as real-time earnings calendars, top gainers, and top losers. On the StoxPit Master Window, the “Queries” menu is where users can find Zacks Buy and Sell recommendations, the earnings calendar, top gainers, and top losers.

Zacks Buys

File Sort

☒ Show only Strong Buy Tickers
 ☐ Show Buy and Strong Buy Tickers

Ticker	Company Name	Divide...
AAN	Aaron's, Inc.	0.2
ABC	AmerisourceBergen Corporat...	1.0
ABCO	The Advisory Board Company	0.
ABR	Arbor Realty Trust Inc.	8.6
ABTL	Autobytel Inc.	0.
ACAS	American Capital, Ltd.	0.
ADES	Advanced Emissions Solution...	0.
ADMS	Adamas Pharmaceuticals, Inc.	0.
AFIS	Advanced Energy Industries I	0.

Zacks Buys

File Sort

☒ Show only Strong Sell Tickers
 ☐ Show Sell and Strong Sell Tickers

Ticker	Company Name	Divide...
AAOI	Applied Optoelectronics, Inc.	0.0
ABGB	Abengoa SA	3.81
ACAT	Arctic Cat Inc.	1.49
AMID	American Midstream Partner...	12.37
ANFI	Amira Nature Foods Ltd.	0.0
ARCO	Arcos Dorados Holdings Inc., ...	0.0
ARDX	Ardelyx Inc.	0.0
ATNY	API Technologies Corp.	0.0
AVH	Avianca Holdings S A	0.0

Top Losers

File Sort

Alerts 0

Ticker	Last ...	Bid	A
ROVI	14.18	14.17 x 4	14.1
SYN	3.17	3.17 x 4	3.18
TZOO	10.69	10.68 x 1	10.7
IRIX	7.2	7.16 x 4	7.2
TCO	11.84	11.73 x 1	11.8
CRF	18.561	18.53 x 1	18.8
UVXY	28.86	28.85 x 3	28.8
FCS	15.055	15.05 x 20	15.0
SHW	258.69	258.68 x 3	258.
GRMN	42.86	42.86 x 6	42.8
DNR	4.8	4.8 x 57	4.81
AREX	5.13	5.13 x 7	5.1
RLGT	7.08	7.08 x 2	7.0
ASML	99.68	99.63 x 7	99.6
UTEK	16.95	16.94 x 3	16.9
EPE	9.84	9.83 x 8	9.8
OHRP	3.896	3.89 x 2	3.9
FCFS	45.5	45.44 x 1	45.6
KLAC	51.72	51.72 x 13	51.7
VXX	16.73	16.73 x 133	16.74
VIXY	11.149	11.14 x 27	11.1
SM	38.19	38.19 x 3	38.2
MTSN	3.17	3.17 x 14	3.18
TSU	14.66	14.66 x 3	14.6
OVAS	28.52	28.51 x 1	28.5
LEA	98.89	98.86 x 3	98.9
AMAT	47.74	47.7 x 47	47.74

Top Gainers

File Sort

Alerts 0

Ticker	Last ...	Bid	A
VLTC	8.59	8.55 x 4	8.58
CEL	5.15	5.13 x 11	5.15
PTNR	3.7791	3.75 x 2	3.7
ANFI	13.39	13.38 x 8	13.4
STV	3.47	3.46 x 2	3.4
NFLX	115.26	115.25 x 3	115.
CCG	6.31	6.3 x 10	6.3
UFPI	57.86	57.81 x 2	58.1
OCUL	27.91	27.82 x 2	27.9
XBIT	17.3099	17.34 x 1	17.4
LPCN	10.59	10.57 x 2	10.5
VJET	6.84	6.74 x 1	6.8
AFMD	20.45	20.39 x 1	20.4
INWK	6.89	6.87 x 2	6.9
EPRS	8.15	8.11 x 1	8.1
PTX	6.045	6.04 x 3	6.0
OSIR	22.0	21.99 x 2	22.0
TUBE	15.38	15.3 x 2	15.3
IMGN	18.41	18.4 x 1	18.4
GNE	10.56	10.54 x 2	10.
UUUU	4.47	4.45 x 3	4.4
SRNE	19.8133	19.77 x 1	19.8
AOI	25.0	24.99 x 1	25.0
MCHX	4.9	4.88 x 1	4.9
MLNX	47.3	47.25 x 1	47.3
ADAP	18.6	18.6 x 1	18.6
FOLD	16.775	16.77 x 0	16.7

Earnings Calendar

File

Earnings Date: 2015-Jul-16 0

Ticker	Earnings Date	Consen...	Zacks_rank	MS rec...	Div. Yield	Volume
AMD	After-Market 07/16/...	\$-0.17	3-Hold	2.1	0.0	1.3520364E7
AMRB	After-Market 07/16/...	\$0.13	3-Hold	3.0	0.0	6.0
ANFI	Pre-Market 07/16/2...	\$n/a	5-Strong Sell	5.0	0.0	71725.0
ANGO	After-Market 07/16/...	\$0.14	4-Sell	5.0	0.0	162513.0
ASB	After-Market 07/16/...	\$0.31				
BBT	Pre-Market 07/16/2...	\$0.68	3-Hold	4.0	2.6	5593348.0
BNK	07/16/2015	\$0.22	4-Sell	0.0	0.0	1033.0
CCG	Pre-Market 07/16/2...	\$0.15	3-Hold	3.0	0.0	391161.0
CE	After-Market 07/16/...	\$1.41	1-Strong Buy	3.6	1.7	0.0
CTAS	After-Market 07/16/...	\$0.84	3-Hold	3.5	0.99	497430.0

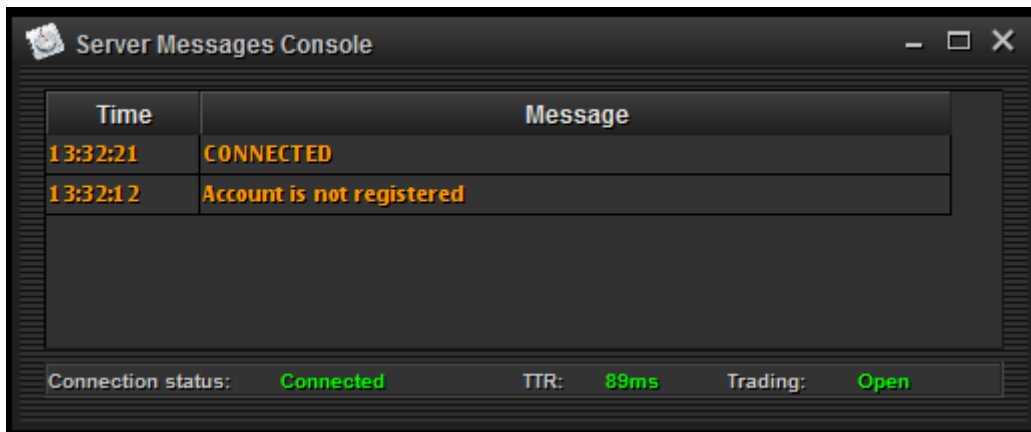


## Blotters (Accounts) Windows

The blotters (accounts) windows provides users detailed information regarding open/active positions, closed and executed positions, pending orders, and server messages. To open any one of the five (5) blotters (accounts) windows, navigate to the StoxPit Master Window and select the “Blotters” dropdown menu.

### Server Message Console Blotter

The server messages console blotter will display any and all internal software and firm messages to the user.

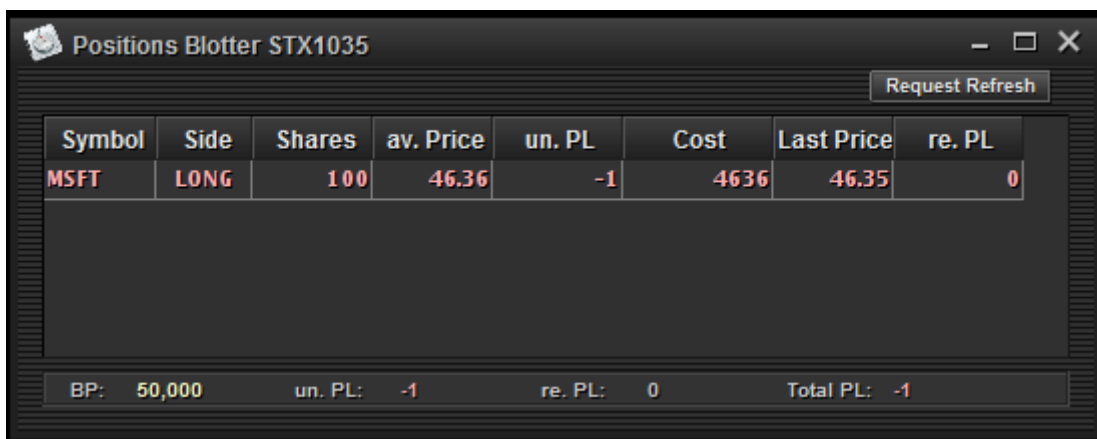


Time	Message
13:32:21	CONNECTED
13:32:12	Account is not registered

Connection status: **Connected**      TTR: **89ms**      Trading: **Open**

### Open Positions Blotter

The open positions blotter will display and all active and open positions.



Symbol	Side	Shares	av. Price	un. PL	Cost	Last Price	re. PL
MSFT	LONG	100	46.36	-1	4636	46.35	0

BP: 50,000      un. PL: -1      re. PL: 0      Total PL: -1

### Executions Blotter

The executions blotter will display any and all executed positions/orders.

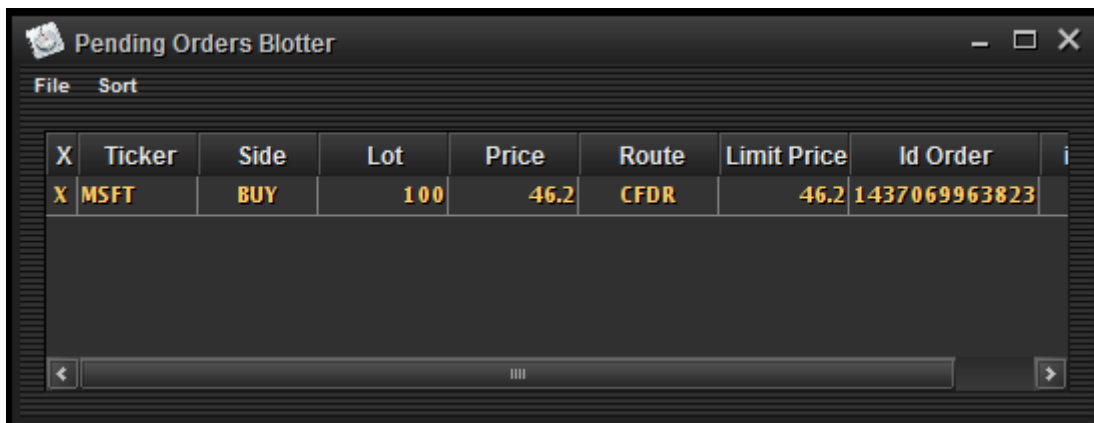


Executions Blotter window showing a table of executed orders.

Time	Ticker	Side	Lot	Price	Route	Id
14:05:01	MSFT	SELL	100	46.36	CFDR	1437069901_
14:03:24	MSFT	BUY	100	46.36	CFDR	1437069804_

### Pending Orders Blotter

The pending orders blotter will display any and all pending orders, prior to fill/execution.

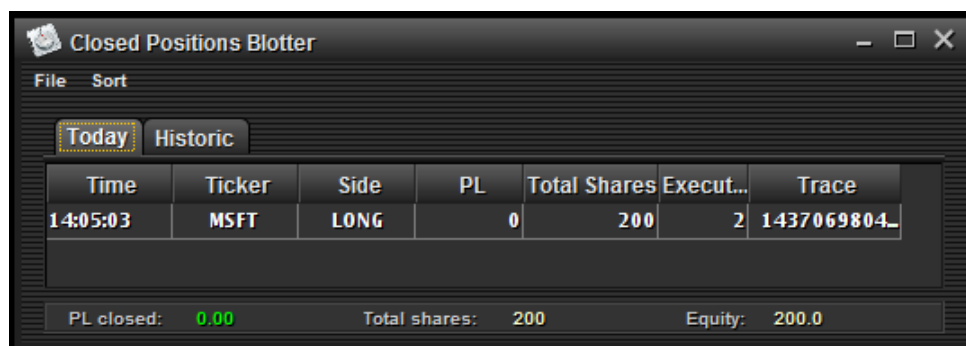


Pending Orders Blotter window showing a table of pending orders.

X	Ticker	Side	Lot	Price	Route	Limit Price	Id Order
X	MSFT	BUY	100	46.2	CFDR	46.2	1437069963823

### Closed Positions Blotter

The closed positions blotter will display any and all closed positions.



Closed Positions Blotter window showing a table of closed positions.

Time	Ticker	Side	PL	Total Shares	Execut...	Trace
14:05:03	MSFT	LONG	0	200	2	1437069804_

Summary: PL closed: 0.00, Total shares: 200, Equity: 200.0

## Understanding & Using the Level II: How to Open & Close Positions

All order/position management will be done using the level II order window.



1. **Ticker Symbol Input** – Enter ticker symbol here to populate the level II window with data & quotes
2. **Lot/Share Size** – Enter desired lot/share amount to open/close positions
3. **Lot/Share Size UP/DOWN** – Use the “+” or “-” to increase or decrease lot/share size
4. **Sell/Short Button** – Sell to close an existing long position, or Short to open a new short position
5. **Position Button** – Populates the Lot/Share size window with the current open position size, if current open position exists
6. **Lot/Share Size UP/DOWN** – Use the “Integer” to increase or decrease lot/share size
7. **Cancel Button** – Cancels last submitted pending order
8. **Buy Button** – Buy to open a new long position, or Buy to close an existing short position
9. **Order Type Selection** – Choose between limit, market, or stop order types
10. **Price Adjustment** – Use the “+” or “-” to increase or decrease price input
11. **Route Selection** – Choose routes to submit order through
12. **Price Input** – Input desired limit price for order fill
13. **Link Window** – Choose existing windows to link with dropdown menu

## Trade Executions – Buy to Open/Close Order



### Buy to Open/Close Order Steps

1. **Select Ticker Symbol**
2. **Select Desired Lot/Share Size**
3. **Select Price** – Users can manually type price into the price box, or click on the BID/ASK columns to populate current BID/ASK price in the price box
4. **Select Desired Routing Exchange**
5. **Select Desired Order Type** – Choose between limit, market, and stop orders
6. **Click “BUY” Button** – Click the BUY button will submit your “Buy to Open” or “Buy to Cover” order

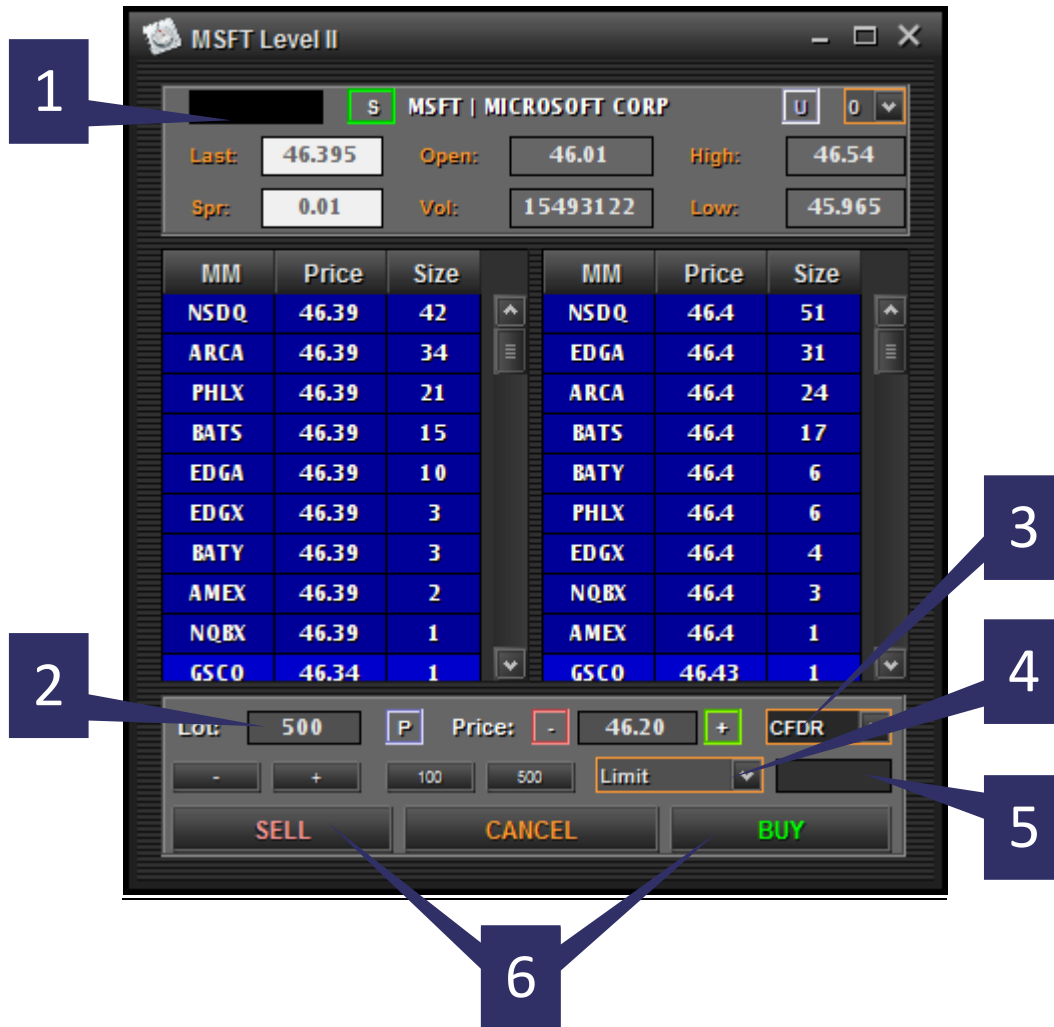
## Trade Executions – Sell to Close/Short to Open Order



### Sell to Close/Short to Open Order Steps

1. **Select Ticker Symbol**
2. **Select Desired Lot/Share Size**
3. **Select Price** – Users can manually type price into the price box, or click on the BID/ASK columns to populate current BID/ASK price in the price box
4. **Select Desired Routing Exchange**
5. **Select Desired Order Type** – Choose between limit, market, and stop orders
6. **Click “SELL” Button** – Click the SELL button will submit your “Sell to Close” or “Short to Open” order

## Trade Executions – Stop Market/Limit Order



### Sell to Close/Short to Open Steps

1. Select Ticker Symbol
2. Select Desired Lot/Share Size
3. Select Desired Routing Exchange
4. Select Desired “Stop” Order Type – Choose between Stop Market & Stop Limit orders
5. Enter Stop Price – If “Stop Limit” is selected, enter the Stop Price in the price box to the RIGHT of the “Stop Limit” order type box. If “Stop Market” is selected, select “Stop Limit” first, enter price, then select “Stop Market” route.
6. Click “BUY/SELL” Button – Clicking the BUY/SELL button will submit your “Stop Limit/Market” order

## **StoxPit Tech Support**

**Email: [support@stoxpit.com](mailto:support@stoxpit.com)**