

# Chapter 7 - List View

## What you will learn in this chapter:

- How to read the List view
- How to identify the current list
- How to change the current list.
- How to filter a list.
- How to customise the List view.
- How to create up to 12 different configurations - called *List Tables*.
- How to create heatmaps.

## Introduction

The List view displays related instruments (e.g. FTSE 100 shares, unit trusts) in tabular format. The List view is very useful for visually comparing instruments. Look at the screen shot below of the List view in ShareScope Gold:

The screenshot displays the ShareScope Gold interface in List view. The main window shows a table of instruments with columns for No., Name, Sector, EPIC, 90 day Volume Average, Last price, Open, Close, Close +/-, Price %, Price high, Price low, Price % 1 month ago, and Price % 3 months ago. A context menu is open over the 'Diageo PLC' row (row 10), showing options like 'Add selected share to portfolio Key FX', 'Add shares above (inc. selected) to portfolio Key FX', 'Add shares below (inc. selected) to portfolio Key FX', 'Add to another portfolio', 'New High/Lows (last 250 trading days)', 'Select sector', 'Graph whole list (weighted by cap.)', 'Graph whole list (not weighted)', 'Company/Sector analysis', 'Edit Imported data', 'Edit note', 'Set an alarm for Diageo PLC', 'Share's Alarms', 'Share's Alerts', 'Share's Directors' Dealings', 'Share's Dates', 'Share's Price List', 'Share's News', 'Share's News Archive', 'Edit share's news search...', 'Edit any modified news search text...', 'Open the company's website', 'Send email to company', 'List design...', and 'Customise menu...'. The status bar at the bottom shows 'Table 1 ( F2)', 'Curr. Port: Key FX', and 'List: FTSE 100'. A horizontal scroll bar is visible below the table.

What can you do in the List view?

- You can select the list of instruments to be displayed.
- You can change the columns in the table
- You can sort by any of the columns.
- You can create up to 12 different layouts – called *List Tables* – and apply them with a single click of the mouse.
- You can customise the style of each of these List Tables.

## List menu

Many of the options available to you in the List View are found on the List menu. You can see this on the menu bar at the top of the screen. An alternative way to access this menu is to right click anywhere in the List view (except for the column headings). We refer to this as the List *context menu*.

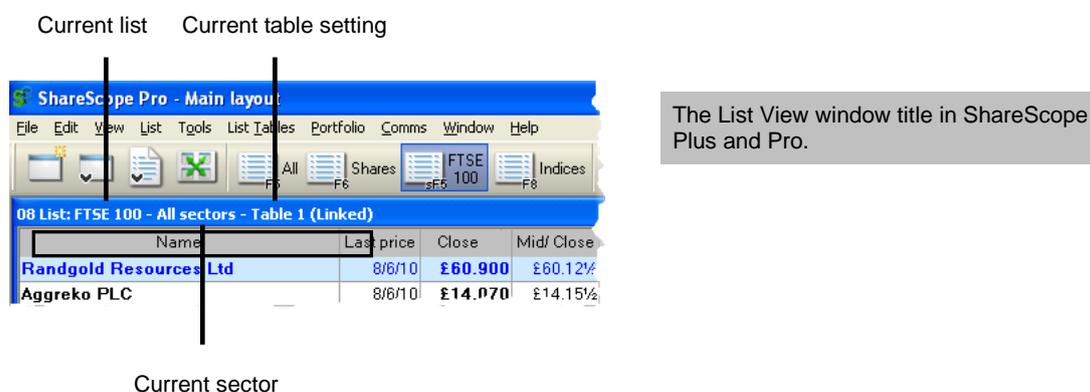
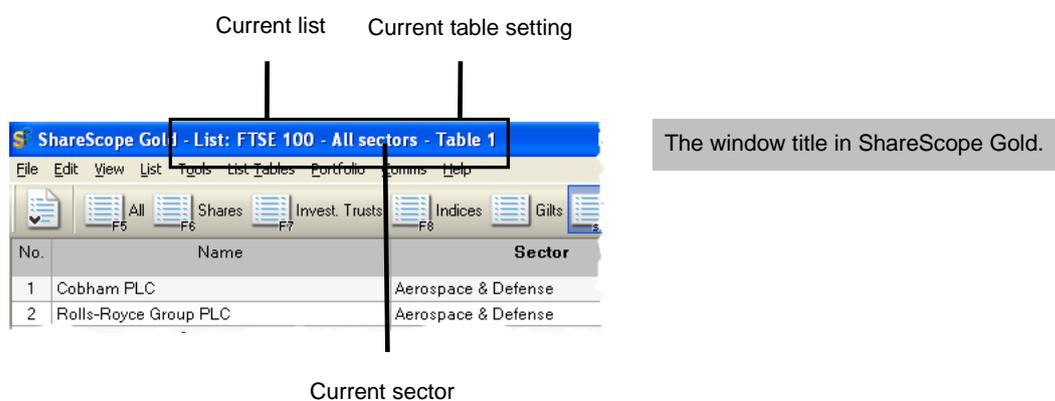
## Fixed Lists

ShareScope contains thousand of instruments. For convenience, ShareScope groups instruments into *fixed lists* for your convenience. For example, you can display a list of FTSE 100 companies, or all AIM companies, or investment trusts or foreign exchange. There are also fixed lists for *all instruments* or *all shares* for when you specifically want a broad list. As aforementioned, you will only be able to display instruments that can be found in the currently selected list.

**Key Concept:** The List view acts as the source list for the Historical Graph, Intraday Graph, Details and Level 2 views. So, for example, if the List screen shows the FTSE 100 then this you will only be able to search for FTSE companies in these other views. Additionally, the sorting applied in the List view will determine the order in which instruments will be displayed when you press the Space bar key in other views.

## How to identify which List you are viewing

The current list, sector and the List Table Layout in use are displayed in the window title.



## Change List

To change the list, right-click in the List view and select **Change List**. A menu of ShareScope's fixed lists will be displayed.

You will notice that you can select some fixed lists from the main toolbar. You can change which lists are available on this toolbar (see the chapter on **Customising Toolbars**).

There are also keyboard shortcuts for many of ShareScope's fixed lists; see the table below.

| Pre-set List                  | Shortcut Key      |
|-------------------------------|-------------------|
| All instruments               | F5                |
| Shares – all ordinary primary | F6                |
| Investment Trusts             | F7                |
| Indices                       | F8                |
| Gilts                         |                   |
| Corporate Bonds               |                   |
| Exchange Traded Funds         |                   |
| Commodities                   |                   |
| Foreign Exchange              |                   |
| Covered Warrants              |                   |
| Warrants                      | CTRL + F7         |
| Preference                    | CTRL + F8         |
| Convertibles                  | CTRL + SHIFT + F5 |
| Income                        | CTRL + SHIFT + F6 |
| Capital                       | CTRL + SHIFT - F7 |
| Other                         | CTRL + SHIFT + F8 |
| Imported data                 | SHIFT + F11       |
| UK                            |                   |
| Europe (Ex. UK)               |                   |

| Pre-set List                      | Shortcut Key |
|-----------------------------------|--------------|
| US (ShareScope Plus/Pro only)     |              |
| FT 30                             |              |
| FTSE 100                          | SHIFT + F5   |
| FTSE 250                          | SHIFT + F6   |
| FTSE 350                          |              |
| FTSE Small Cap                    | SHIFT + F7   |
| FTSE All-Share                    |              |
| FTSE Fledging                     | SHIFT + F8   |
| LSE Non-Index                     | CTRL + F5    |
| AIM                               | CTRL + F6    |
| Sector Indices (FTSE 350)         |              |
| TechMark                          |              |
| TechMark 100                      |              |
| LSE (all instruments)             |              |
| LSE (shares only)                 |              |
| NASDAQ (ShareScope Plus/Pro only) |              |
| NYSE (ShareScope Plus/Pro only)   |              |
| AMEX (ShareScope Plus/Pro only)   |              |
|                                   |              |

## Moving around the List View

To move around the List View use the horizontal and vertical scrolls bars or use the keyboard arrows.

You can select instruments directly using the mouse cursor: **click** anywhere along a desired row to highlight that instrument.

You can step through instruments in a list by pressing the **Space** key. To step backwards through a list, use the **Shift + Space** keys.

Other views in ShareScope are similar to the structure of the List view – Data Mining, Portfolios, Alarms. Understanding the basics in this chapter will allow you to use these other ShareScope views.

## Searching the List View

Searching for another instrument has been described in detail in the previous chapter. However, here is a brief summary:

- Scroll through longer lists using the vertical scroll bar.
- Press the Space bar to move through the list one instrument at a time. Press Shift and Space bar to move back up the list.
- Simply start typing the first few letters of the instrument's name or EPIC, or its ISIN or SEDOL. ShareScope will find the instrument for you. See **Find a share** in the **Navigation** chapter.

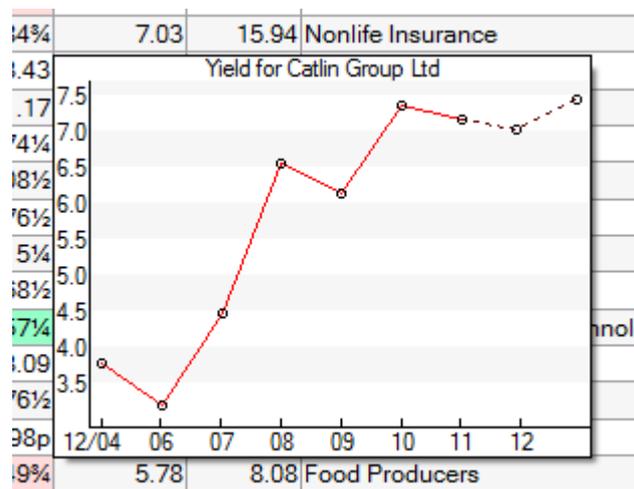
## Data tips & pop-up graphs

In some columns, you can reveal further information by hovering the mouse cursor over the data value. In some columns, this may be text-based (a data tip); in others it may be a graph (pop-up graph).

For example, positioning the mouse cursor over a share's latest mid price in Plus or Pro will reveal the current bid, offer, spread and VWAP (the average price of shares traded):

|            |              |      |
|------------|--------------|------|
|            | £3.85        | 7.03 |
|            | £3.84¾       | 6.79 |
| Mid        | £3.85        |      |
| Bid        | £3.84¾       |      |
| Offer      | £3.85        |      |
| Spread %   | 0.10         |      |
| VWAP       | £3.90¾       |      |
| Price time | 14:43:19 BST |      |
| LC         |              |      |

Mousing over a column such as dividend yield will display a graph of the historical and projected yields:



Data tips and pop-up graphs disappear as soon as you move the mouse away from the cell.

## Historical shares

By default, ShareScope includes in its lists shares that no longer trade. This is because many investors' portfolios include holdings in these shares. These shares are coloured green in the list. To hide these shares, go to ShareScope's **View** menu. The **Show historical shares** option will have a tick next to it if currently enabled. Selecting the option toggles it between enabled and disabled.

## Filtering a List

For shares, unit trusts and investment trust lists you can filter the list by sector. For shares, you can filter by ICB classification and select from: Financial/Non-financial, Industry, Supersector, Sector or Subsector. For unit trusts and OEICs, you can filter by IMA sector and for investment trusts you can filter by AIC sector.

To select a sector, right-click in the List view and then click on **Select sector**. A submenu appears with two further options; click on **Choose the sector**. A dialog appears in which you can choose the desired sector.

Once you have selected a sector, the window title will update. The current sector will also appear in brackets after the **Select sector** menu option.

To return to the unfiltered list, call up the context menu again and click on **Select sector**.

## New Highs and New Lows

You can also filter a list of instruments to show new highs or new lows. That is, ShareScope looks back to see if the latest price is the highest or lowest price over a specified period. The default lookback period is 250 trading days (roughly a year). This can be a useful way of finding momentum stocks or companies that have broken through key resistance or support levels.

Right-click in the List view, then click on **New Highs/Lows** and then select either **Restrict list to New Highs** or **Restrict list to New Lows** from the submenu. To change the lookback period, select **Highs and Lows Settings** from the same submenu.

**TIP:** pressing the Tab key in the List view will cycle through the full list, new highs only and new lows only.

## Sorting a List

You can sort a list using any of the columns. Double click on the column heading to sort in ascending order and double-click again to sort in descending order.

## List Tables

Rather than overloading a List Table with too much information, you can create up to twelve different List Tables. Each table can contain its own arrangement of columns and styles. Each template is simply referred to as a Table.

For example, you might use different Tables to organise different sets of information: price performance over various timeframes, or results and ratios, or key company dates. Additionally you may want to create different Tables for looking at different lists: shares, unit trusts, investment trusts or foreign exchange.

**Any changes you make are saved to the current List Table only.**

Click on the **List Tables** menu and you will see the twelve Tables available to you. By default, the first four Tables are preconfigured but you can change these. The remaining eight Tables include only the Number and Name columns. Click on any of the Tables to apply them.

From this menu you can also rename, copy, save and restore Tables. To rename or copy a Table other than the currently active, you must change to that Table first.

|                       |               |
|-----------------------|---------------|
| ✓ Table 1             | F2            |
| Table 2               | F3            |
| Table 3               | F4            |
| Table 4               | Shift+F2      |
| Table 5               | Shift+F3      |
| Table 6               | Shift+F4      |
| Table 7               | Ctrl+F2       |
| Table 8               | Ctrl+F3       |
| Table 9               | Ctrl+F4       |
| Table 10              | Shift+Ctrl+F2 |
| Table 11              | Shift+Ctrl+F3 |
| Table 12              | Shift+Ctrl+F4 |
| Rename table...       |               |
| Copy this table to... |               |
| Save and restore ▶    |               |

In the bottom left corner of the ShareScope window there are buttons for the first four Tables:



Simply click on a button to apply the List Table. If you change the name of a Table, the new name will appear on the button.

**Key Concept:** ShareScope always remembers which table you last used for each list. This means that when you change the List a different List Table may be used. The reason for this is that you are likely to create different tables for use with different lists like, for example, shares, unit trusts or foreign exchange.

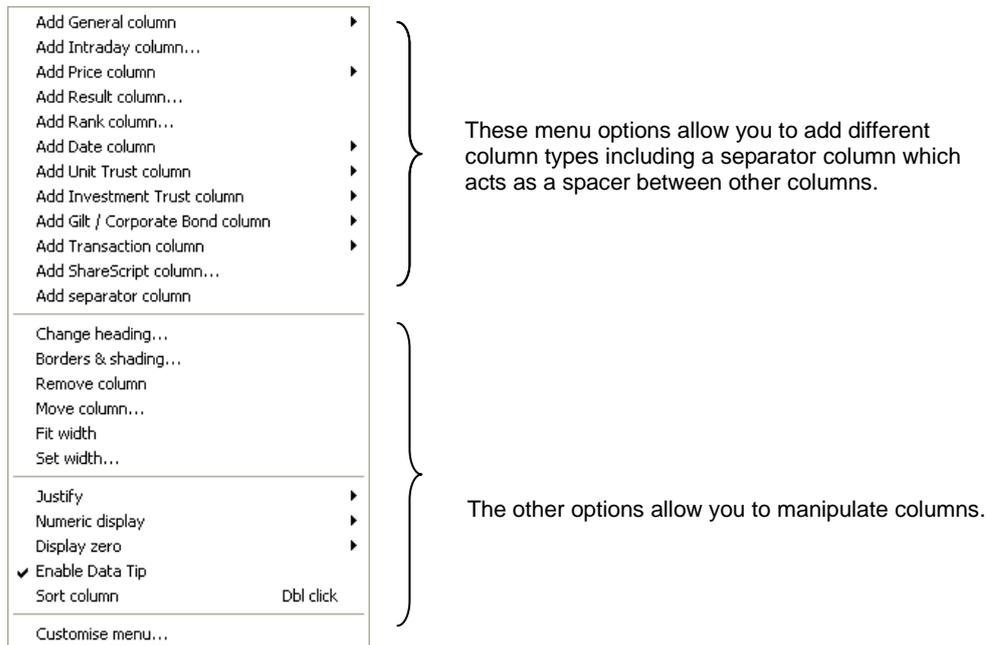
## Customising List Tables

There are three ways to customise a List Table:

- Add, remove and reposition columns
- Customise individual columns
- Change the overall style settings for the List Table – font, colours, spacing etc.

## Add new columns

Columns can be added, removed, renamed, moved, styled and formatted. **Right click** on a column heading to launch the Column context menu below to access all column options:



Select a column from the column categories in the context menu. An overview of each column type is given in the table below. New columns are inserted to the left of the column heading in which you right-clicked. For example in the example below, a new column will be inserted to the left of the 'Last price' column.

Where the new column will appear

| Mid/Close | Last price | Close   |
|-----------|------------|---------|
| 65p       | 19/5/09    | 65.000p |
| £3.84%    | 19/5/09    | £3.847  |
| £1.00¼    | 19/5/09    | £1.003  |
| £11.72    | 19/5/09    | £11.720 |
| £2.40½    | 19/5/09    | £2.405  |
| £3.11%    | 19/5/09    | £3.117  |
| £2.46     | 19/5/09    | £2.460  |

Column heading right-clicked on.

If you inadvertently add a column in the wrong place, simply click and drag it to the desired position.

| Column Category            | Details   |
|----------------------------|---|
| <b>General</b>             | Includes items such as Sector and Index, Company specific information such as the company activities and contact details and some fundamental results such as Dividends, Yield, EPS and P/E. You can also add up to 10 Notes columns enabling you to record your own thoughts or information about a company. |
| <b>Intraday*</b>           | (Plus/Pro only) includes items such as current Mid, Bid and Offer, Trade prices, cumulative volume and micrographs.   |
| <b>Price</b>               | Columns relating to the instrument's price, performance and volume traded. Columns can be added displaying current, historical and percentage change data.  |
| <b>Result</b>              | Headline and Advanced results and ratios such as Turnover, EPS Growth, Gearing, ROCE and more.  |
| <b>Rank</b>                | Allows you to rank a share compared to other shares in the same Sector, Sub-sector, Industry or within the entire market based on selected Headline or Advanced results and ratios.   |
| <b>Date</b>                | Columns containing company dates such as AGM date, final ex-dividend date, next annual report and more.   |
| <b>Unit Trust</b>          | Columns specific to Unit Trusts such as fund net assets and total expense ratio.  |
| <b>Investment Trust</b>    | Columns specific to Investment Trusts such as fair NAV and premium/discount to NAV.   |
| <b>Gilt/Corporate Bond</b> | Columns specific to Gilts and Corporate bonds such as coupon, income yield and gross redemption yield.  |
| <b>Transaction</b>         | Columns relating to the buying and selling of instruments, such as Annualised Return, Number of Shares and Average Price. Used in ShareScope's Portfolio and transactions views.  |
| <b>Risk Analysis*</b>      | Columns that can be used to determine the performance and 'riskiness' of investment instruments.  |
| <b>ShareScript*</b>        | Add columns to display custom values created using ShareScript files. These enable you to calculate metrics not provided by ShareScope (Plus & Pro only). Visit <a href="http://www.sharescript.co.uk">www.sharescript.co.uk</a> for more information.  |
| <b>Separator</b>           | Adds an empty column that you can use to separate groups of columns.  |

\* This feature is not available in ShareScope Gold.

## Remove a column

To remove a column, right-click in the column heading and select **Remove column** from the context menu. You can also right click on a column and press the **V** key to quickly delete.

## Move a column

To change the position of a column, simply click and drag it to the desired position. Alternatively, right-click in the column heading and select **Move column** from the context menu. Each column is assigned a value from 1 to n (where n is the total number of columns), left to right, and this determines its position. To move a column simply enter a value that is lower (to move it left), or higher (to move it right) than its current value.

## Customising individual columns

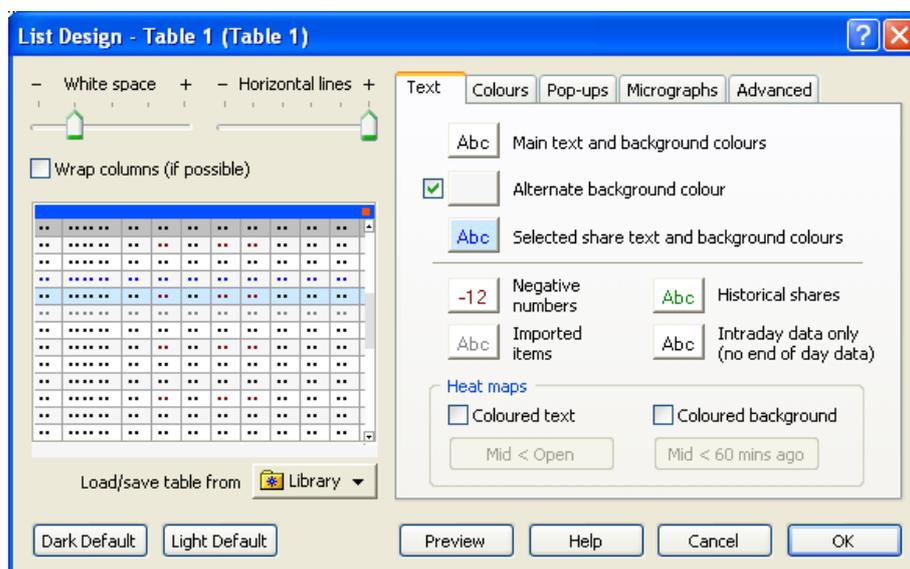
Columns will be styled according to the current List Table settings. These can be viewed and modified using the **List design** dialog (see next section). However, you can override these settings and customise individual columns using some of the options on the Column context menu. These are summarised below:

| Column options                       | Description   |
|--------------------------------------|---|
| <b>Change heading</b>                | Select to rename the column.  |
| <b>Borders &amp; shading</b>         | Select to customise the style of the column. You can specify the text colour, background, style and the style of the left and right borders. This will apply just to the column..   |
| <b>Fit width</b><br><b>Set width</b> | <p>The width of a column can be set exactly in pixels, set to auto-fit or adjusted with the mouse,</p> <p>To set an exact width: select <b>Set width</b>. The width of a column is measured in pixels and the value can range between 20 and 1,000.</p> <p>To set the width of a column to automatically 'best fit' the data within the column: select <b>Fit width</b>. This will resize the width of the column to fit the longest row of information contained within the column.</p> <p>To adjust the width by hand hover the mouse over the vertical border on the right side of the column heading, wait for the cursor to change to horizontal arrows, and drag the column left or right.</p>  |
| <b>Justify</b>                       | Select from left, right or centre justified alignment of the contents of a column. The default is for text to be left justified and numbers right justified.  |
| <b>Numeric display</b>               | <p>Select to display numbers either with <b>decimals</b> or <b>fractions</b>. If you would like ShareScope to choose the number of decimal places displayed for you, then select <b>Dynamic decimal places</b>.</p> <p>You also have the option to display the price in pounds or pence, depending on your preference. Once again if you select <b>Dynamic Pounds/Pence</b>, ShareScope will decide whether it is best to display pence or pounds.</p> <p>Some fonts will not display fractions; instead you will get an unreadable symbol. There are two choices: either do not use fractions or switch to a font through the List design dialog, such as Arial or Times New Roman, which does allow fractions. To switch fonts, see <b>Text Tab</b> on page 12.</p> |
| <b>Display zero</b>                  | You can choose to display zero as a value (0), a dash (-) or leave the column blank.  |

|  |   |
|--|---|
| <b>Display as number</b>                             | You can display some text columns, such as Broker consensus, in their numeric form. In the case of Broker consensus, the lower the number, the more positive the consensus.   |
| <b>Show Up/Down arrow</b>                            | Arrows indicating the change in the current value of a column can be added to selected items, such as the Last price column.  |
| <b>Enable Data Tip</b><br><b>Enable Pop-up Graph</b> | Depending on the type of column, you can enable/disable data tips or pop-up graphs. These can be switched off globally (i.e. for all List Tables) by going to the <b>Tools</b> menu, then <b>Options</b> , then the <b>General</b> tab and unticking <b>Enable pop-up data tips on all views</b> .  |
| <b>Sort column</b>                                   | Select to sort the column in to ascending or descending order. You can also <b>double click</b> on the column heading with the mouse. To sort in to descending order, select this option again or double click on the column heading again.   |
| <b>Pop-up Graphs</b>                                 | <p>Pop-up Graphs offer a snapshot of a stock's performance and projected future performance for the columns: EPS, EPS Growth, P/E, Profits, Turnover, Dividend and Yield. You do not need to leave the List View to see these graphs, simply hover the mouse over a column cell and the graph will pop-up. Where more than one type of share is available for a company, the main ordinary share will be used.</p> <p>Graphs for P/E, PEG and Yield are, by default, calculate using rolling daily values. You can disable this feature so that only the actual values from the day of the results are used. See page 14 for enabling or disabling this feature.</p> <p>By default pop-up graphs are enabled for all lists and suitable columns. To disable this feature globally see page xxx. You can enable or disable pop-up graphs for individual columns by selecting <b>Enable Pop-up Graph</b> from the column context menu. A tick against this option indicates it is enabled. If there is no tick it means it is currently disabled.</p> |

## List Table design

To view or modify the style of a List Table, right-click anywhere in the List view (except in the column headings) and select **List design** from the context menu.



List design dialog - Text tab

The Table you are customising will be displayed in the title of the List design dialog. If you have renamed your Table, the title will show “List Design – Table name – (Table number)”. Otherwise the default name of the Table will be displayed (e.g. Table 1).

The **Micrograph** and **Advanced** tabs are only available in ShareScope Plus and Pro.

**Note:** Any column customisations using the options on the List context menu (e.g. colour, justification) will take priority over the style you specify in the List Design dialog box.

### Spacing, Lines, Colours and Column Wrapping

On the left hand portion of the dialog box you can make basic appearance changes to the table. To adjust the amount of white space in the table, click and drag the slider for **White space**. You may find that the rows are easier to view if the white space between rows is increased. Similarly, click and drag the **Horizontal lines** slider to adjust the number of lines between rows. Sliding to the left will produce fewer lines, while sliding to the right will produce more.

**Wrap columns** will display the information horizontally rather than vertically. The vertical scroll bar will disappear and the information spans across the screen.

The colour scheme of the table can quickly be changed using the **Dark Default** List Default button which will apply a dark colour scheme or the **Light Default** button which will apply a light colour scheme.

Changes to the table are instantly previewed on the left hand side as a thumbnail of the original table.

The **Library** button is covered in more detail in chapter xxx.

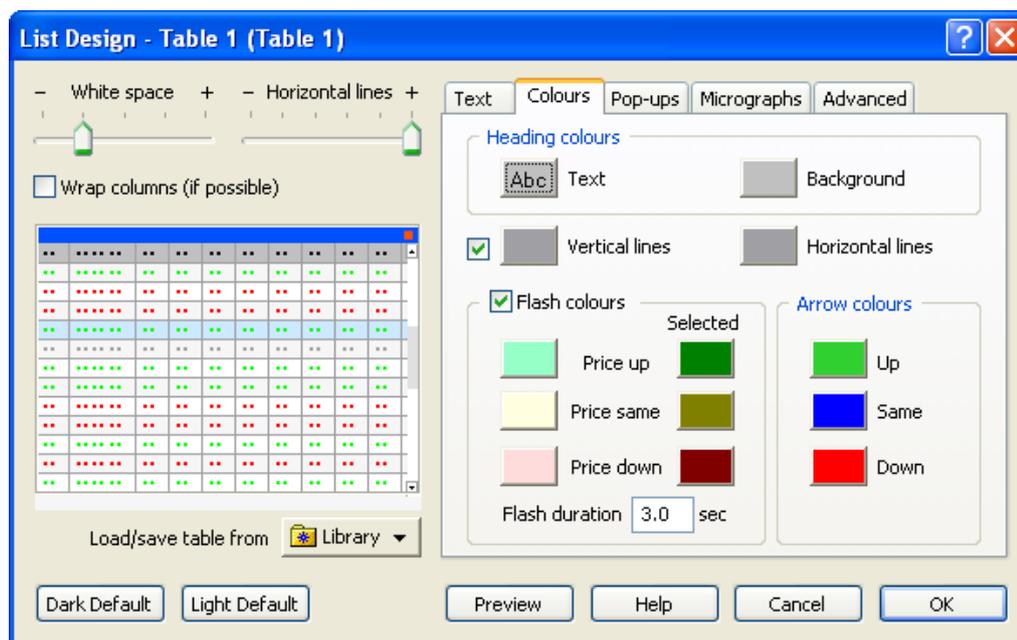
### Text Tab

The text tab allows you to change the colour, style and size of font in the table. In addition to this you can set alternating background colours for rows in a table and change the appearance of the currently selected rows. These visual changes can make a table easier to read.

- **Main text and background colours** - This setting sets the style and colour of text and the background colour of a table. Columns will take their formatting from here unless they have been individually configured using the options on the List context menu.
- **Alternate background colour** - Setting an alternate background colour will override the default background colour of alternate rows with a second colour. Click the tick box to enable this option and specify a colour using the associated colour button.
- **Selected share text and background colours** - By default ShareScope displays the currently selected share using different text and background colours from those used by the rest of the list. This helps you to see which share you have selected from a list of shares. These colours and font can be changed using this option.
- Certain types of information in a table can be displayed in different colours if desired. Click on the associated colour button to change the font colour of **Negative numbers**, **Imported items**, **Historical shares** and **Intraday data** (ShareScope Plus and Pro only). The **Coloured text** and **Coloured background** options are to do with creating heat maps – see the section on Heat maps at the end of this chapter.

## Colours Tab

The colour tab controls the text and background colour of column headings, table lines, intraday price movements and price direction arrows:



- **Heading colours** - The **Text** button defines the style, size and colour of font in column headings. The **Background** button sets the background colour of headings.
- **Lines** - The colour of the lines which separate table columns and rows can be set using the **Vertical lines** and **Horizontal lines** colour buttons. Both lines can be toggled invisible by unticking the tick box next to **Vertical lines**. Horizontal lines are controlled by the slider bar, as described earlier.
- **Flash colours** (ShareScope Plus and Pro only) - Where an intraday connection is available, flash colours can be used to show short term price movements in a list, as prices are updated. Select the colours you wish to use for prices moving up, staying the same and moving down together with the selected colour (the colour of the price when the row is selected) and the flash duration in seconds.
- **Arrow colours** - Arrows are used in columns which display numeric values that compare themselves to a previous occasion. The arrows indicate at a glance whether a value is up, down or the same. Set the colour of each arrow using the corresponding button.

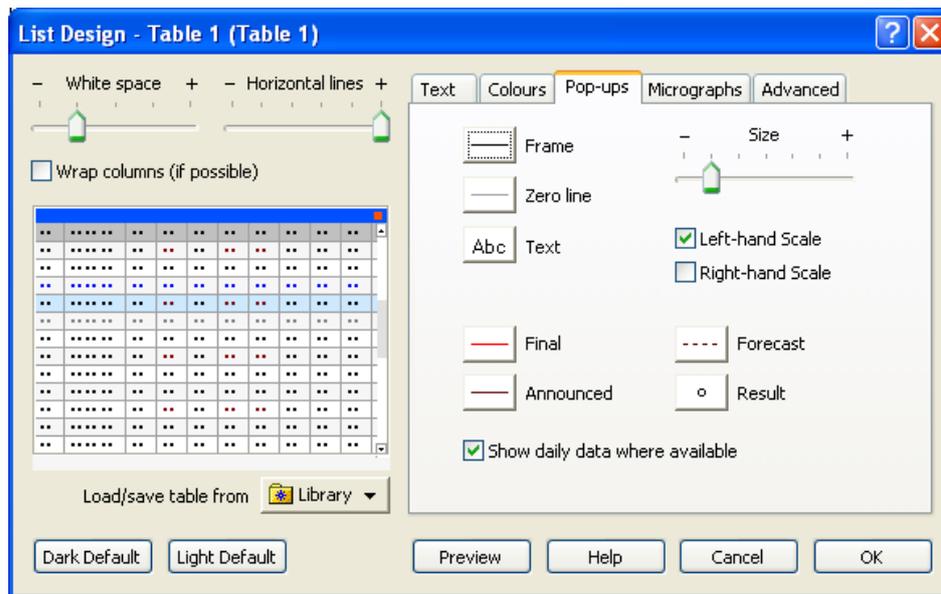
## Pop-ups Tab

You can edit the appearance of pop-up graphs in the Pop-ups tab. This feature applies to the Profit, Turnover, P/E, PEG, EPS, Dividend and Yield columns. Click on the corresponding colour button to change the colour and style of the **Frame**, **Zero line**, **Final**, **Announced**, **Forecast** and **Result**.

The size of the pop-up graph can be increased by sliding the **Size** horizontal slider to the right, and decreased by sliding to the left. To adjust the slider, **click** and **hold** the slider, then move the mouse left or right.

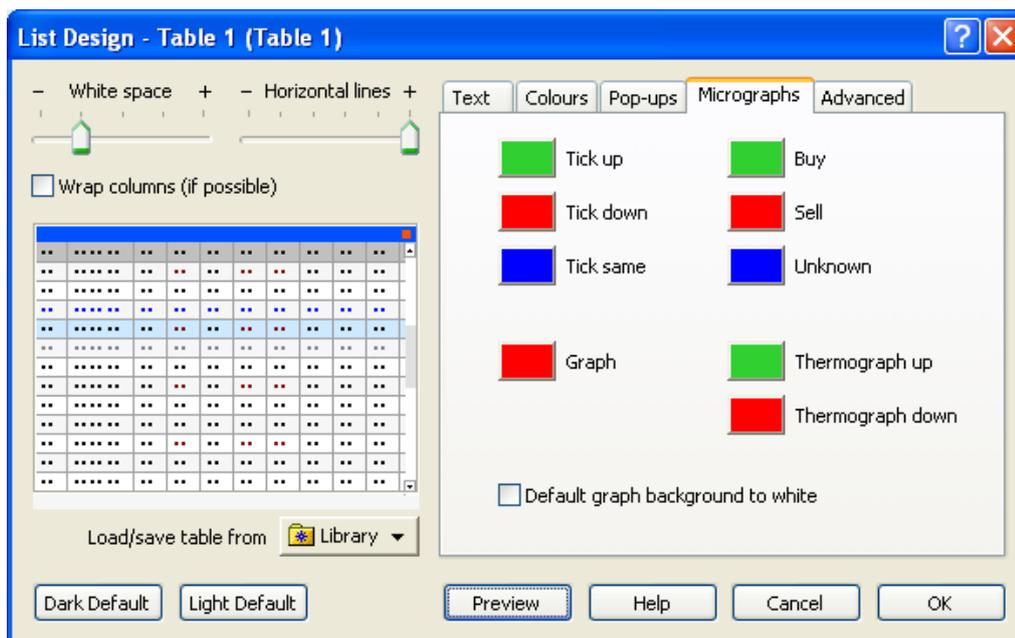
The vertical scale can be displayed on either the left or right hand side, or both sides of the pop-up graph. Select or deselect from **Left-hand Scale** and **Right-hand Scale** to make your choice.

By Default, ShareScope plots only the announced results on the graph however daily data can be used by ticking the **Show daily data where available** option.



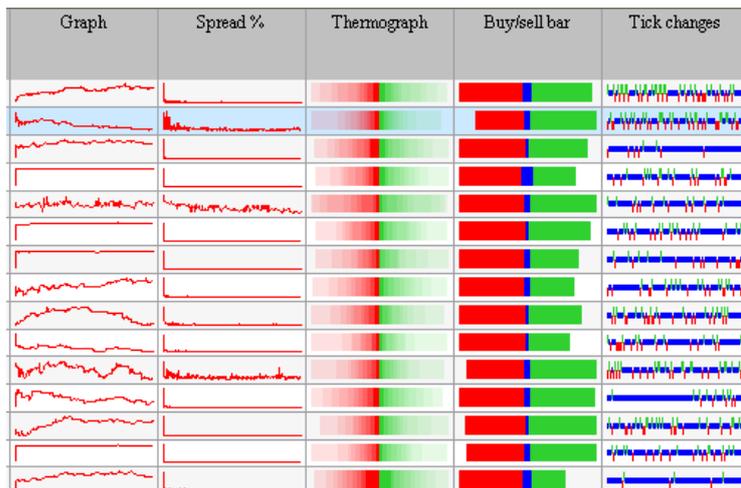
### Micrographs Tab - ShareScope Plus and Pro only

Micrographs are small graphs that can be added to a List Table to give a visual representation of the day's movements for a share. You can add a graph, spread graph, thermograph, buy/sell bar and tick changes graph. See below for an example of micrographs in a Table. Refer to the inbuilt help for more information about each micrograph, by clicking the **Help** button in the dialog box.



Set the colours of the various micrographs using the colour buttons. The graph and spread graph both use the **Graph** colour button.

**Note:** To add a micrograph to a List View: Right click on a column heading, select **Add Intraday column** from the context menu, then from the dialog that appears select a graph from the **Graph** tab.



| EPIC | Close  | Mid/Close from close | Mid/Close % from close |
|------|--------|----------------------|------------------------|
| ARM  | £3.90  | ▲ 22½p               | ▲ 5.73                 |
| BRBY | £9.45½ | ▲ 15¼p               | ▲ 1.67                 |
| CNE  | £4.47½ | ▲ 7¼p                | ▲ 1.63                 |
| HMSO | £3.89  | ▲ 6p                 | ▲ 1.54                 |
| BTA  | £1.39  | ▲ 1¼p                | ▲ 1.04                 |
| ISYS | £2.83½ | ▲ 2½p                | ▲ 0.90                 |
| RB   | £34.95 | ▲ 26p                | ▲ 0.74                 |
| AMEC | £9.73½ | ▲ 6¼p                | ▲ 0.67                 |
| BG   | £11.37 | ▲ 8p                 | ▲ 0.70                 |
| RR   | £5.75  | ▲ 4p                 | ▲ 0.70                 |

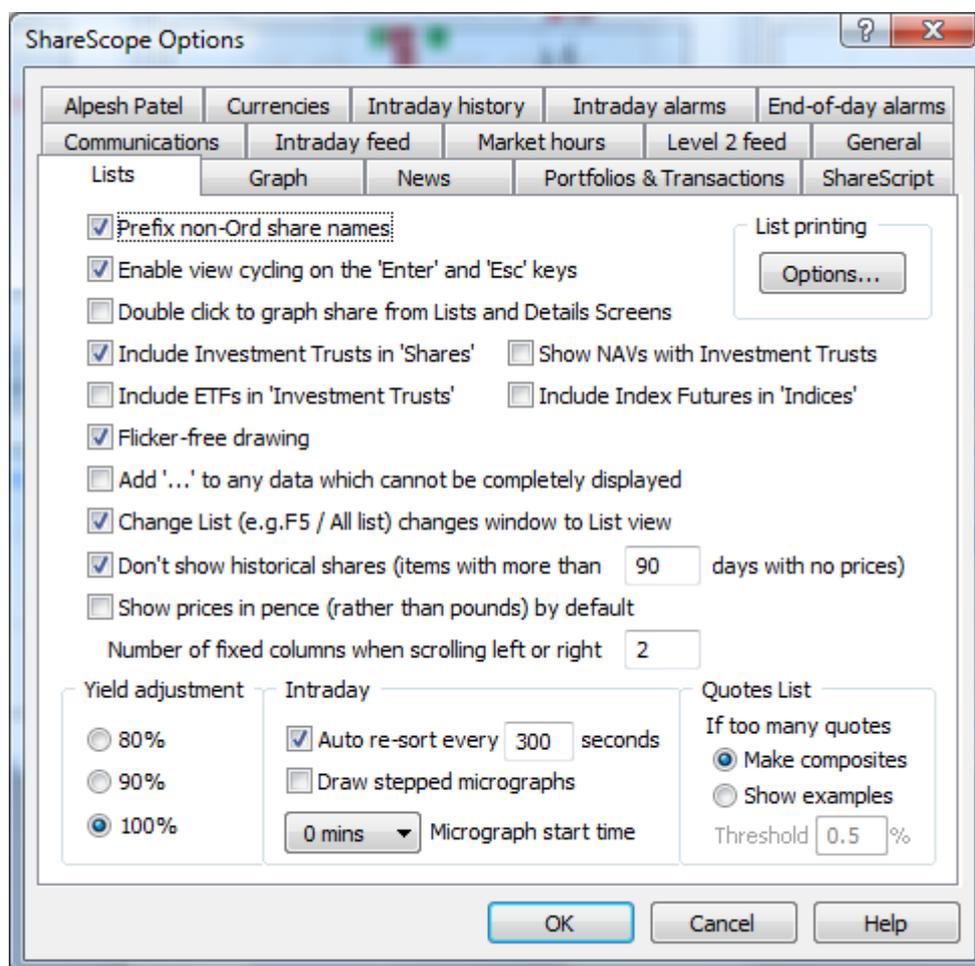
  

| EPIC | Close   | Mid/Close from close | Mid/Close % from close |
|------|---------|----------------------|------------------------|
| ANTO | £12.11  | ▼ -39p               | ▼ -3.22                |
| KAZ  | £14.28  | ▼ -45½p              | ▼ -3.19                |
| AAL  | £25.50½ | ▼ -59¼p              | ▼ -2.33                |
| OML  | £1.38   | ▼ -3p                | ▼ -2.21                |
| AGK  | £15.45  | ▼ -25¼p              | ▼ -1.65                |
| WEIR | £13.71  | ▼ -21¼p              | ▼ -1.57                |
| AV   | £3.99   | ▼ -6¼p               | ▼ -1.54                |
| CCL  | £24.87  | ▼ -33p               | ▼ -1.33                |
| UU   | £5.73   | ▼ -7¼p               | ▼ -1.31                |
| ADM  | £16.43  | ▼ -20¼p              | ▼ -1.25                |

On the left, top risers. On the right, top fallers. Both windows use the same list table but in each the **Mid/close %** column is sorted in the opposite direction. This is achieved by setting **Independent sorting** in one of the windows. In both windows, the **Keep list position** option is enabled to maintain the view of the top ten shares.

## List options

There are a number of global options which apply to all List Tables. You can find these by going to the **Tools** menu, then **Options** and then clicking on the **Lists** tab:



- **Prefix non-Ord share names** allows you to add a prefix character so that any shares that are not Ordinary can be easily identified.
- **Enable view cycling on the 'Enter' and 'Esc' Keys** enables you to disable ShareScope's normal view cycling (see Chapter 4 – Navigation).
- **Double click to graph a share from Lists and Details Screens** allows an alternative way to move from the List view to the graph of the selected share – especially if you have disabled view cycling (above).

- **Include Investment Trusts in 'Shares'** – there is a separate fixed list for investment trusts. This option enables you to choose whether to include them in the Shares fixed list or not.
- **Include ETFs in 'Investment Trusts'** – some Exchange Traded Funds (ETFs) are classed as investment trusts. Choose here whether or not to include them in the Investment Trusts fixed list. There is a separate Exchange Traded Funds fixed list.
- **Show NAVs with Investment Trusts** – ShareScope includes Net Asset Value (NAV) data for each investment trust. It is effectively another instrument which can be graphed against the trust itself. Choose whether or not to include these NAV “instruments” in the Investment Trust fixed list.
- **Include Index Futures in 'Indices'** - choose whether or not to include these derivative instruments in the Indices fixed list. There is a separate Index Futures fixed list.
- **Flicker-free drawing** prevents a list screen from flickering when you are scrolling through it.
- **Add '...' to any data which cannot be completely displayed** displays an ellipsis to indicate that the information in a column has been truncated. To view the information in its entirety, move the cursor over it and a data tip will appear. Alternatively you can change the width of the entire column by right-clicking in the column heading and selecting the **Fit width** option or you can drag the edge of the column heading to the desired width.
- **Change List (e.g. F5/All list) changes window to List view.** This option determines which view ShareScope displays when you change list, i.e. by using any of the list toolbar buttons, list keyboard accelerators or via the View menu. If this option is **on**, ShareScope displays a list screen showing whichever list you have selected. This is the default setting. If this option is **off**, ShareScope changes the **underlying** list but keeps the original view.  
  
**Note:** The appearance of the list toolbar buttons changes subtly depending on whether this option is selected or not.
- **Don't show historical shares** allows you to exclude shares which are no longer trading. This includes shares that are no longer traded following a merger/acquisition, change of company name etc. You can specify the time period after which such shares will be excluded.
- **Show prices in pence (rather than pounds) by default** will show share prices in pence.
- **Number of fixed columns when scrolling left or right:** a number of columns can be made to remain fixed when scrolling a list horizontally. Normally this is the share number and name but you can adjust how many columns are fixed.
- **Yield adjustment** - this lets you adjust yield calculations to reflect the effects of taxation. The default **100%** shows Net yields. **90%** shows Gross yields including the (current) 10% dividend tax credit. **80%** shows Gross yields including the (current) 20% dividend tax credit. Note that tax rates may change. Note also that yields added through the Advanced Results and Ratios tab cannot be adjusted using this option as they are always Net yields.

The following options are available for ShareScope Plus/Pro/Alpha only:

- **Auto re-sort**- if selected, refreshes lists which are sorted on intraday columns. You can set the refresh rate in the range 1 to 999 seconds.
- **Draw stepped micrographs**, if selected means that micrographs will draw a flat line between two points of data until there is a new tick. Once there is a new tick you will then see the micrograph move up or down.
- Use the **Micrograph start time** drop down menu to choose which time micrographs start from. This can be at market open or up to + or - 30 minutes.

## What else can you do in the List View?

The following options can all be selected from the list context menu or by using keyboard shortcuts:

- Add shares to a **Portfolio**. Create your own lists of shares then track, research and reflect your own investments by adding transactions. Learn more in the **Portfolios and Transactions** chapter.
- Find shares that **are gaining** momentum and breaking price trends using **New Highs/Lows**. Learn more about filtering by new highs and lows on page xxx.
- Graph all shares in a list by using **Graph whole list**. Learn more about graphs **on page xxx**.
- View a breakdown by sector of shares in a list with **Company/Sector analysis**. Learn more about Company/Sector analysis in the **Portfolios and Transactions** chapter.
- Edit note columns associated with a share. To add a note column select from the column context menu **Add General column**, then **Note** and select from **Note 1-10**.
- Create **Alarms** for shares so that you are alerted to changing market conditions and events.
- View a list of directors' and major holders' dealings and holdings using **Share's Directors dealings**. Learn more about Directors' dealings on page xxx.
- View important company dates using **Share's Dates**. You can also use the keyboard accelerator **SHIFT + .** (full stop).
- View the share's price history in tabular format by using **Price list**. You can also use the keyboard accelerator **/** (forward slash).
- View news stories that have been downloaded for the selected share using **Share's News**. You can also use the keyboard accelerator **\** (back slash).
- Connect to the online news archive and view all available news stories for the selected share using **Share's News Archive**. You can also press the keyboard accelerator **CTRL + N**.
- Open the company website of any UK-listed company or the Morningstar web page for any unit trust or OEIC. You can also use the keyboard accelerator **CTRL + W**.
- Send an email to any UK-listed company. ShareScope will launch your default email client.

## Heat maps

As mentioned earlier in this chapter, a heat map is a particular configuration of a List Table. It can tell you the direction of the market, the strength of a trend, the individual performance of each share, and which shares are driving the trend.

In a normal List Table, prices are displayed with a fixed background and text colour. In a heat map prices are coloured conditionally depending on price movements. Text colour, background colour or both can be set to indicate the direction of price movement.

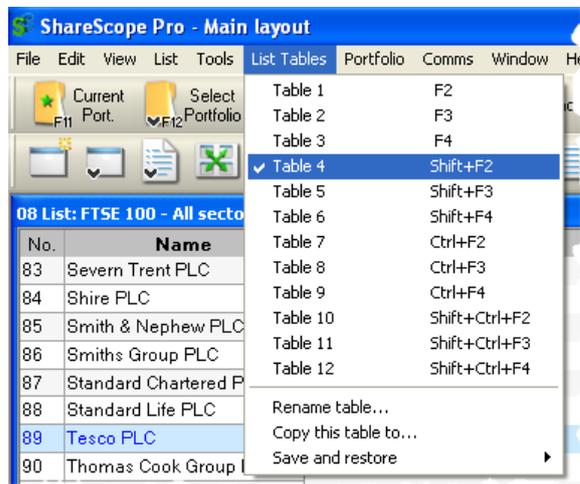
You can add an extra layer of information to the List Table by using ShareScope flags to highlight news, dividends, alarms, bids and suspensions.

You can create a heat map based on end-of-day prices or intraday prices (in ShareScope Plus & Pro only). If

you choose to create an intraday heat map you will need to connect to the intraday feed. To connect, select the **Comms** menu and choose **Connect to delayed/real time intraday feed**.

In this example we are going to create a heat map for the FTSE 100 list.

To create a heat map, select an unused Table from the **List Table** menu. By default, Tables 4 to 12 are unused. In this example we have selected Table 4, as shown below. ShareScope will remember our Table choice for the next time we open the FTSE 100 list.



If you have selected an unused table, it will appear mostly blank except for the **No.** and **Name** column.

| 08 List: FTSE 100 - All sectors - Table 4 (Linked) |                          |
|--|--------------------------|
| No.  | Name                     |
| 1  | 3i Group PLC             |
| 2  | Admiral Group PLC        |
| 3  | African Barrick Gold Ltd |
| 4  | Aggreko PLC              |
| 5  | Alliance Trust PLC       |
| 6  | AMEC PLC                 |
| 7  | Anglo American PLC       |
| 8  | Antofagasta PLC          |
| 9  | ARM Holdings PLC         |

In our example we are going to create an intraday heat map. Add the **EPIC**, **Mid/Close** and **Mid/Close % from close** columns. To add these columns, select from the column context menu:

- **Add General column**, then **EPIC**.
- **Add Intraday column**, then **Mid/Close** (Price, Latest Value).
- **Add Intraday column**, then **Mid/Close** (Price, % from previous close).

If you want to create a heat map based on end-of-day prices add the **EPIC**, **Close** and **% Price + / -** columns. To add these columns, select from the column context menu:

- **Add General column**, then **EPIC**.
- **Add Price column**, then **Price**.
- **Add Price column**, then **% Price + / -**.

Once you have added the columns, remove the **No** and **Name** columns. If you find the EPIC unfamiliar, you can always see the name of a share again in a data tip by hovering the mouse over an **EPIC** code.

To make the column headings smaller, change the heading name of **Mid/Close % from close** to **mid % +/-**.

To help see more of the heat map at a glance, we can wrap the columns to repeat the same group horizontally across the List Table. To wrap columns, **right click** in a list and from the list context menu select **List design**, then tick **Wrap columns** on the left hand side of the dialog. Wrapped groups of columns are separated by a thick vertical line.

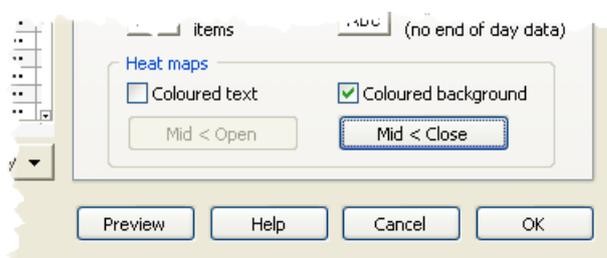
| EPIC | Mid/Close | Mid % +/- |
|------|-----------|-----------|
| ARM  | £4.14½    | 6.09      |
| BRBY | £10.02    | 5.98      |
| HMSO | £4.06½    | 4.39      |
| STAN | £19.29½   | 3.63      |
| ISYS | £2.93¾    | 3.60      |
| SDR  | £14.40    | 3.15      |
| BA   | £3.47½    | 3.09      |
| III  | £2.88     | 2.97      |
| BT.A | £1.43     | 2.88      |
| KGF  | £2.31½    | 2.85      |
| BG   | £11.69    | 2.81      |
| CNE  | £4.60     | 2.79      |
| RBS  | 49½p      | 2.77      |
| WOS  | £15.30    | 2.75      |
| RR   | £5.90½    | 2.70      |
| TLW  | £12.99    | 2.69      |
| NXT  | £22.19    | 2.31      |
| LAND | £6.38½    | 2.16      |
| WPP  | £7.22½    | 2.12      |
| XTA  | £12.34½   | 2.11      |
| LLOY | 76½p      | 2.08      |
| AMEC | £9.93½    | 2.05      |
| SAB  | £20.27    | 1.81      |
| SL   | £2.31½    | 1.80      |
| BARC | £3.11½    | 1.80      |
| IHG  | £11.34    | 1.80      |

Table without column wrapping.

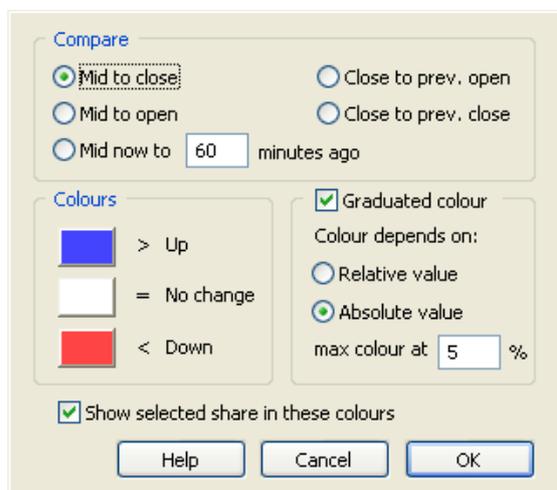
| EPIC | Mid/Close | Mid % +/- | EPIC  | Mid/Close | Mid % +/- | EPIC | Mid/Close | Mid % +/- | EPIC | Mid/Close | Mid % +/- |
|------|-----------|-----------|-------|-----------|-----------|------|-----------|-----------|------|-----------|-----------|
| ARM  | £4.14½    | 6.09      | IHG   | £11.34    | 1.80      | CSCQ | £3.68½    | 1.07      | HSBA | £6.66½    | 0.35      |
| BRBY | £10.02    | 5.98      | CFI   | £7.71     | 1.78      | PRU  | £6.15½    | 1.07      | IAP  | £4.31½    | 0.30      |
| HMSO | £4.06½    | 4.39      | BNZL  | £7.71½    | 1.78      | PFC  | £14.11    | 1.00      | AU   | £17.71    | 0.23      |
| STAN | £19.29½   | 3.63      | SN    | £5.76½    | 1.77      | CCL  | £25.11    | 0.97      | TT   | £2.24     | 0.18      |
| ISYS | £2.93¾    | 3.60      | WBT   | £16.22    | 1.76      | VED  | £22.81    | 0.93      | ULVR | £17.93    | 0.17      |
| SDR  | £14.40    | 3.15      | BAY   | £2.44     | 1.75      | COB  | £2.34     | 0.91      | BSY  | £7.09     | 0.14      |
| BA   | £3.47½    | 3.09      | SMIN  | £12.27    | 1.74      | EMG  | £2.21½    | 0.82      | CNA  | £3.33½    | 0.12      |
| III  | £2.88     | 2.97      | BLND  | £4.72½    | 1.68      | ESSR | £4.41     | 0.78      | IFPI | £3.87¾    | 0.10      |
| BT.A | £1.43     | 2.88      | LGEN  | £1.03     | 1.68      | MRW  | £3.02     | 0.73      | TOMK | £3.24½    | 0.06      |
| KGF  | £2.31½    | 2.85      | MKS   | £3.80½    | 1.60      | SHP  | £14.72    | 0.68      | BP   | £4.05     | -0.05     |
| BG   | £11.69    | 2.81      | GFS   | £2.60½    | 1.60      | AZN  | £33.34    | 0.68      | ITRK | £18.27    | -0.05     |
| CNE  | £4.60     | 2.79      | INVPI | £5.02½    | 1.60      | EXFN | £6.78½    | 0.67      | IMT  | £19.40    | -0.15     |
| RBS  | 49½p      | 2.77      | RSL   | £2.33½    | 1.57      | WEIR | £13.80    | 0.66      | PSON | £9.92½    | -0.20     |
| WOS  | £15.30    | 2.75      | BATS  | £24.30½   | 1.57      | REL  | £5.40½    | 0.65      | SVT  | £13.40    | -0.30     |
| RR   | £5.90½    | 2.70      | LMI   | £17.18    | 1.48      | ENRC | £9.03     | 0.61      | UU   | £5.71     | -0.35     |
| TLW  | £12.99    | 2.69      | ATST  | £3.36½    | 1.42      | SGE  | £2.58½    | 0.58      | KAZ  | £14.21    | -0.49     |
| NXT  | £22.19    | 2.31      | SBRV  | £3.95     | 1.36      | CPG  | £5.43½    | 0.56      | VOD  | £1.61     | -0.53     |
| LAND | £6.38½    | 2.16      | OML   | £1.39½    | 1.31      | DGE  | £10.98    | 0.55      | ABG  | £5.96½    | -0.58     |
| WPP  | £7.22½    | 2.12      | FFES  | £12.32    | 1.23      | AV   | £4.01     | 0.50      | AAL  | £25.35    | -0.61     |
| XTA  | £12.34½   | 2.11      | RB    | £35.38    | 1.23      | RDSB | £18.45    | 0.49      | ADM  | £16.32    | -0.67     |
| LLOY | 76½p      | 2.08      | TSCO  | £4.39     | 1.22      | SRP  | £6.25½    | 0.48      | SSE  | £11.25    | -0.71     |
| AMEC | £9.93½    | 2.05      | RIO   | £36.95½   | 1.16      | BLT  | £20.09½   | 0.47      | AGK  | £15.34    | -0.71     |
| SAB  | £20.27    | 1.81      | JMAT  | £17.63    | 1.09      | RSA  | £1.30½    | 0.46      | NG   | £5.43     | -1.00     |
| SL   | £2.31½    | 1.80      | ISAT  | £7.03     | 1.08      | GSK  | £12.64½   | 0.44      | RRS  | £64.85    | -1.14     |
| BARC | £3.11½    | 1.80      | REX   | £3.10½    | 1.07      | ABF  | £10.71    | 0.37      | ANTO | £11.81    | -2.48     |

Table with column wrapping.

Finally, to apply the heat map, go back to the **List Design** dialog box and then tick **Coloured background** in the **Heat maps** panel of the **Text** tab. If you prefer to colour the text instead, tick **Coloured text**. The heat map options discussed later apply to both coloured text and background.



Click the button beneath **Coloured background** to set the heat map colouring options.



In our example we are going to select **Mid to close** to colour price movement by the difference between the latest intraday price and the previous close. For ShareScope Gold users – select **Close to prev. close**. Click **OK** and **Preview** the options. Click **OK** to accept the changes and close the dialog.

Double click on **Mid % +/-** (Mid/Close % from close) or **Price %** column heading if creating an end-of-day heat map, to sort the shares by performance.

You will see the background of shares will be blue for mid prices greater than the close, white for those the same and red for shares that have dropped in value (unless you have changed the colours).

To show the degree by which the prices have changed, we can use graduated colours. Select the button beneath **Coloured background** again. Tick **Graduated colour** and choose from **Relative** or **Absolute value**.

**Relative value** will assign the brightest colour to the share that has moved the most in percentage terms over the period and colour all of the other shares in proportion (lighter shades of red and blue).

**Absolute value** is similar to relative value colouring but here all shares that have risen or fallen by a specified percentage will be assigned the brightest colour. For example, if **max colour** is set to 5%, any movement greater than 5% will be coloured the brightest. The appearance of the list will vary from day to day depending on price movements. Quiet days will be pale in colours whereas a day with bigger price movements will have brighter colours.

You can try either Graduated colour option quickly by clicking **OK** and using the **Preview** button in the List Design dialog box. In our example, we have selected Absolute value with **max colour** at 5%.

The Table should immediately begin to fill with colours. As we sorted by **Mid % +/-** (Mid/Close % from close) the colours will align themselves automatically:

| 08 List: FTSE 100 - All sectors - Table 4 (Linked) |            |           |      |            |           |      |            |           |      |            |           |  |
|--|------------|-----------|------|------------|-----------|------|------------|-----------|------|------------|-----------|--|
| EPIC   | Mid/ Close | Mid % +/- | EPIC | Mid/ Close | Mid % +/- | EPIC | Mid/ Close | Mid % +/- | EPIC | Mid/ Close | Mid % +/- |  |
| VED  | £24.93%    | ▲ 6.97    | IAP  | £4.36%     | ▲ 1.45    | ATST | £3.27%     | ▲ 0.71    | NXT  | £21.54%    | ▲ 0.21    |  |
| RIO  | £35.14     | ▲ 5.68    | AU.  | £19.82     | ▲ 1.43    | BG.  | £11.23%    | ▲ 0.69    | RB.  | £33.05%    | ▲ 0.20    |  |
| XTA  | £10.76%    | ▲ 4.84    | HMSO | £3.65%     | ▲ 1.43    | IHG  | £12.23     | ▲ 0.66    | SBRY | £3.32%     | ▲ 0.20    |  |
| BLT  | £20.28     | ▲ 4.54    | ISAT | £7.65%     | ▲ 1.36    | BSY  | £7.02%     | ▲ 0.61    | PSON | £9.60%     | ▲ 0.13    |  |
| ANTO   | £9.15%     | ▲ 4.36    | SGRO | £2.75%     | ▲ 1.34    | RSA  | £1.24%     | ▲ 0.61    | IMT  | £19.30%    | ▲ 0.13    |  |
| KAZ  | £12.42%    | ▲ 4.06    | BARC | £3.16%     | ▲ 1.34    | WPP  | £7.06%     | ▲ 0.61    | COB  | £2.34      | ▲ 0.13    |  |
| AAL  | £27.47%    | ▲ 3.88    | SAB  | £20.25%    | ▲ 1.31    | LLOY | 56%p       | ▲ 0.59    | REX  | £3.25%     | ▲ 0.11    |  |
| FRES   | £10.99%    | ▲ 3.73    | ABF  | £10.12     | ▲ 1.30    | SL   | £1.89%     | ▲ 0.56    | ARM  | £2.90%     | ▼ -0.02   |  |
| PFC  | £12.84%    | ▲ 3.42    | ULVR | £19.21     | ▲ 1.21    | SGE  | £2.47%     | ▲ 0.55    | CNA  | £3.01%     | ▼ -0.05   |  |
| SMIN   | £11.77     | ▲ 3.25    | STAN | £17.84%    | ▲ 1.20    | CW.  | 91%p       | ▲ 0.52    | MRW  | £2.62%     | ▼ -0.06   |  |
| LMI  | £17.20     | ▲ 3.12    | WOS  | £15.93     | ▲ 1.14    | SHP  | £14.52%    | ▲ 0.52    | AZN  | £30.63     | ▼ -0.16   |  |
| ENRC   | £10.79%    | ▲ 3.10    | BLND | £4.62%     | ▲ 1.13    | BAY  | £2.15%     | ▲ 0.51    | KGF  | £2.29%     | ▼ -0.20   |  |
| ISYS   | £2.90%     | ▲ 2.56    | RR.  | £6.06%     | ▲ 1.13    | WTB  | £14.84     | ▲ 0.47    | GSK  | £11.93%    | ▼ -0.23   |  |
| CSCG   | £3.44%     | ▲ 2.31    | EXPN | £6.42%     | ▲ 1.10    | IPR  | £3.22%     | ▲ 0.47    | CPG  | £5.65%     | ▼ -0.40   |  |
| PRU  | £5.78%     | ▲ 2.25    | III  | £3.02%     | ▲ 1.09    | REL  | £5.03%     | ▲ 0.45    | CPI  | £7.82%     | ▼ -0.41   |  |
| TLW  | £11.74%    | ▲ 2.13    | SDR  | £13.15%    | ▲ 1.04    | SN.  | £6.67%     | ▲ 0.41    | SRP  | £6.18%     | ▼ -0.44   |  |
| RRS  | £65.60     | ▲ 2.02    | AMEC | £8.59%     | ▲ 1.03    | ESSR | £4.67%     | ▲ 0.41    | BA.  | £3.24%     | ▼ -0.44   |  |
| CNE  | £4.43%     | ▲ 1.89    | LGEN | 85%p       | ▲ 1.01    | SSE  | £11.32%    | ▲ 0.40    | RBS  | 46%p       | ▼ -0.51   |  |
| OML  | £1.15%     | ▲ 1.89    | LAND | £6.14%     | ▲ 0.86    | BNZL | £7.47%     | ▲ 0.37    | NG.  | £5.12%     | ▼ -0.73   |  |
| EMG  | £2.53      | ▲ 1.87    | DGE  | £11.21%    | ▲ 0.85    | BT.A | £1.37%     | ▲ 0.37    | ABG  | £6.49%     | ▼ -0.84   |  |
| RDSB   | £17.79%    | ▲ 1.64    | GFS  | £2.82%     | ▲ 0.80    | BATS | £21.84%    | ▲ 0.33    | TT.  | £2.22%     | ▼ -0.91   |  |
| BRBY   | £8.10      | ▲ 1.63    | AV.  | £3.56      | ▲ 0.76    | VOD  | £1.43%     | ▲ 0.33    | UU.  | £5.33%     | ▼ -1.07   |  |
| INVP   | £5.04%     | ▲ 1.60    | ADM  | £14.28%    | ▲ 0.74    | HOME | £2.36%     | ▲ 0.28    | MKS  | £3.47%     | ▼ -1.08   |  |
| JMAT   | £16.52%    | ▲ 1.50    | AGK  | £14.57%    | ▲ 0.73    | CCL  | £25.87     | ▲ 0.27    | SVT  | £12.28%    | ▼ -1.09   |  |
| HSBA   | £6.58      | ▲ 1.46    | ITRK | £14.57%    | ▲ 0.73    | TSCO | £3.91%     | ▲ 0.22    | BP.  | £3.44%     | ▼ -3.52   |  |

If you're using Flash colours in addition to the heat map, the background colour of prices will flash brighter for a few seconds as they change.