

Unfair Advantage® QuickStart Manual

Your guide to getting started with CSI®

by Commodity Systems, Inc.

CSI is the world leader in supplying market data to market analysts and serious investors. Specializing in daily updates and in-depth historical data on commodities, futures, stocks, indices, funds and options, plus cash and fundamental/government series, CSI has been delivering accurate data for nearly three decades. Data, remarkable software and service: CSI provides it all. The truth is, you'll not find more accurate data or better service anywhere - at any price.

Unfair Advantage QuickStart Manual

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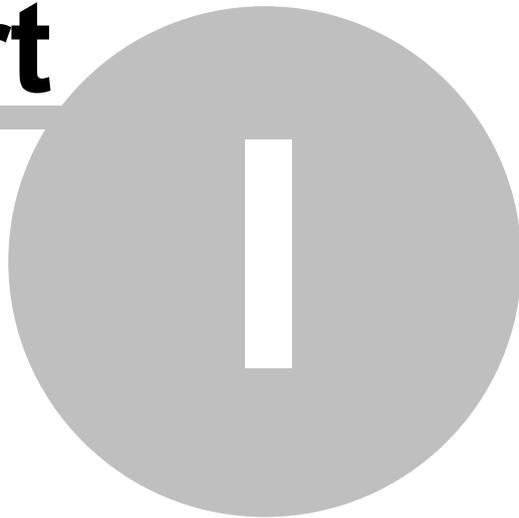
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Part



1 Introduction

1.1 Welcome

Unfair Advantage® (UA) is a remarkably versatile program. Its major functions are:

1) Database - Depending upon your subscription category, you may have access to unparalleled historical scope of world futures markets reaching back to the 1950s and beyond. Market categories cover every conceivable commodity product (including options) and an inventory of stocks, economic series, funds and indices from the U.S., U.K., Canada and other world financial markets. Commitments of Traders information is also available through UA.

2) Updating - This feature adds current market data to the historical database provided on your initial CD-ROM and stored on your computer's hard drive. Each update retrieves daily summary prices on all markets within your subscription category, which may include any or all of the markets in CSI's vast database. Intraday updates can be added to your daily Unfair Advantage charts through the new SnapQuote (SQ) feature, which retrieves prices from third-party sources.

Downloaded information is distributed to a database file, from which the other formats are exported for use. Any UA data file can be made available for charting or other types of analysis. Updates of the database are handled through the Internet using your own Web Browser and Internet Service Provider. Replacement files of historical data are also available online to protect users from inadvertent data corruption. CSI also maintains a backup dial-in link for data retrieval with a modem.

3) Portfolio Management - Unfair Advantage's portfolio system maintains your favorite charts and exported files. Contracts or stocks of interest are listed in your choice of multiple portfolios (directories) so that they can be viewed or accessed instantly. Your portfolios can be customized to accommodate third-party software.

4) Charting/Analysis - You'll love the functionality and ease of Unfair Advantage's charting package. Super-compressed or vividly detailed charts can be viewed instantly on your ad hoc choice of markets. Charts may be annotated with text and other tools such as trend lines and ellipses. This release offers bar and candlestick charts with volume, open interest and cash. An expanding list of technical indicators includes COT indicators, stochastics, moving averages, put/call ratios, spreads, Moving Average Convergence/Divergence, RSI, At-The-Money Study, basis and seasonal index studies.

Interpreted Studies allow for custom programming of user-defined indicators, and include an extensive collection of studies that may be used as-is or modified to meet your individual needs. Charts may be printed or may be saved as a clipboard image for pasting into documents.

5) Alternative Analysis - The unique Trading System Performance Evaluator™ (TSPE) can assess your account funding requirements and your likelihood of experiencing a profitable performance.

6) UA's MarketScanner™ tool enables the trader to apply custom indicators to lists of stocks and futures, and to screen data using a host of fundamental data. The analyst can capture market statistics on any of a variety of market groups and then sort and

filter this data to reveal those that meet a particular criterion. For example, you might sort the NASDAQ stocks by the six-month rate of return, or by current RSI values, etc.

7) The Position Manager module reports ongoing valuations for your various portfolios, even when they contain a combination of commodities, stocks and funds, and even when the products are quoted in mixed currencies. Intraday updates (that do not become part of your CSI database) can be captured from various third-party websites and used to update valuations throughout the day for most markets.

8) Programmers can use a built-in API to access all data with fast, in-memory simplicity.

1.2 Hardware & Communication Requirements

Hardware Requirements

Unfair Advantage is a 32-bit Windows® application. It requires:

- Windows NT®, Windows 98®, Windows ME®, Windows 2000® or Windows XP® operating system
- A Pentium®-powered PC computer with speeds of 200Mz or faster
- CD-ROM drive*
- At least 256 MB of RAM
- At least an SVGA monitor
- A mouse or comparable pointing device
- A modem or direct network access
- A minimum of 256 colors desktop setting is required

- Disk space requirements: Software, 50 MB; Data, 600 MB + 94 MB annual growth (for full database). Futures only, 85 MB + 8 MB annual growth; Stocks, 350 MB + 56 MB annual growth; Options, 165 MB + 30 MB annual growth.

*Some UA software is shipped on CDR disks, which may not be compatible with certain CD drives. If your drive cannot read the CD we provide, please contact CSI technical support about replacement software.

Communication Requirements

- Internet Access is recommended. Broadband service is suggested for best results.
Microsoft Internet Explorer version 5.0 or higher (for Direct Internet access).
Other Internet browsers may be used when "Browser" access is selected.
- Direct-dial (standard phone line with modem) access is available.

If you do not yet have an Internet connection, you may proceed with data retrieval through a direct-dial phone call to CSI's host with your modem. If you plan to use the Internet, now is the time to order a startup kit from the company of your choice.

The user, NOT CSI, is responsible for all on-line access charges and/or long-distance phone charges associated with retrieving data.

1.3 Locked Database & Disk Termination

Unfair Advantage comes to you with a "locked database." This means that you cannot access the data for charting or analysis until it is "unlocked." The process of unlocking the database is simple: First install the database on your hard drive, then collect a daily update from CSI. This unlocks the database. Please read on and you will learn how to proceed.

Look at the package in which your Unfair Advantage CD was supplied. You'll notice that the database expiration date is printed there. You must install the software and begin updating by this date.

The Unfair Advantage database must be updated at least once every month to keep the software working. Failure to update within a two (2) month span during your current subscription may result in the temporary loss of license to use the database and additional expenses. If you allow your database to lapse more than two months, the database will be corrupted by an irreparable elapsed-time gap and a replacement CD must be ordered from CSI and installed. A daily update must then be downloaded to restore the software's functionality. A fee for costs will apply.

1.4 Customer Service & Support

CSI offers support for Unfair Advantage users in many ways:

- 1) Unfair Advantage comes with a QuickStart manual to help you get up and running quickly.

2) Unfair Advantage comes with a complete online manual that you can read from your computer screen as a Help file. To view, click the Help menu from the main UA menu, and then click "Help Topics." A pop-up Help window displays with manual text. Click the [Contents] button for a full listing of the manual content. You may search for a given topic by clicking the [Index] button and typing your search key.

Double-click any chapter or topic to reveal its content and use the scroll arrows at the right side of the window as necessary to view the full content of your selected topic. If you prefer, you can view the manual in a larger format (filling your computer screen) by clicking the square box at the upper right-hand corner of the help window. This will maximize the help topic. To revert to the smaller size, click the box again (although it will now have a double-box appearance).

You'll find many underlined links throughout the online manual, which are pathways to information on related topics. Click on any link to read more on that topic. Click [Back] to return to the previous screen or [>>] to go to the next topic. Click the [Internet] button to access the CSI website for product information and support. Future upgrades will utilize the Microsoft "What's this?" convention for interactive help. Updated digital manuals are often included in new versions of Unfair Advantage software, which are posted on the CSI website periodically.

UA also provides automatic links to the manual through its interactive help feature. To learn about a topic directly from your UA screen, position your mouse cursor over the desired screen prompt or menu selection and press the <F1> function key.

3) Current Frequently Asked Questions (with answers) and

notices are posted on the CSI website at www.csidata.com. These are located in the Tech Talk column of our monthly Technical Journals. They often provide a quick solution to simple problems.

4) Periodic upgrades are made available, usually at no charge, on our website. Downloading a software upgrade on the CSI website at www.csidata.com can sometimes solve problems that have already been discovered and fixed by the CSI software development team. Each upgrade includes a description of current capabilities, as well as known problems with the release.

5) Background information is at your fingertips. Unfair Advantage's Online Factsheets include footnotes that explain data anomalies that might cause concern. Click "Factsheet" on the Database menu to answer most questions about historical data.

6) We offer an e-mail technical support system for questions and comments. Contact our service staff through the "Email Your Question" entry on the Help menu (support@csidata.com). Questions are usually answered the day they are received.

7) Our friendly, knowledgeable technical support staff is available for telephone support from 8:30 a.m. to 9:30 p.m. (eastern time) Monday - Friday, except on major holidays. **The telephone number is 1 (561) 392-8663.**

Our programming staff strives to identify and correct any error associated with our software, but we need enough information to reproduce a problem before we can fix it. Please gather the information below before contacting customer service about a possible software error:

- Your User ID
- Your Windows Version
- Your Unfair Advantage version number
- The exact wording of any error message
- The name of the active window at the time of the problem
- The conditions when the error occurred
- A list of steps that led to the problem
- A detailed description of what has been tried so far

There is no charge for contacting our service staff, however, we ask that our customers use CSI support services in the order presented above, with exceptions as needed for urgent situations. In this way, we can provide the best service possible to all our customers, and assure that our staff is available for you when you need us most.

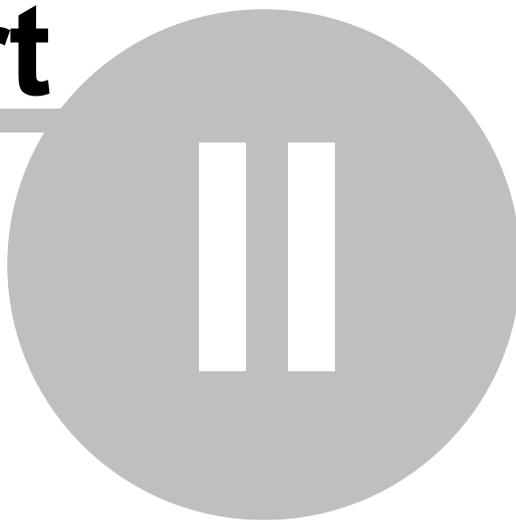
1.5 Beyond QuickStart

This QuickStart Manual will give you a general understanding of the installation, updating, charting, portfolios, exporting and intraday quote capabilities of Unfair Advantage. We hope you enjoy using the software and will continue exploring the many program features through hands-on experience and by consulting the full online reference manual.



For an additional walk-through of program features, click the "Guided Tour" button on the UA toolbar.

Part



2 Installing Unfair Advantage

2.1 Loading the UA Software

The Unfair Advantage experience begins with loading the software and appropriate database on your computer, then follows up with updating and analysis. Please note that everything supplied on the Unfair Advantage CD-ROM is compressed and must be installed on your computer before it can be used. We'll lead you through the process here.

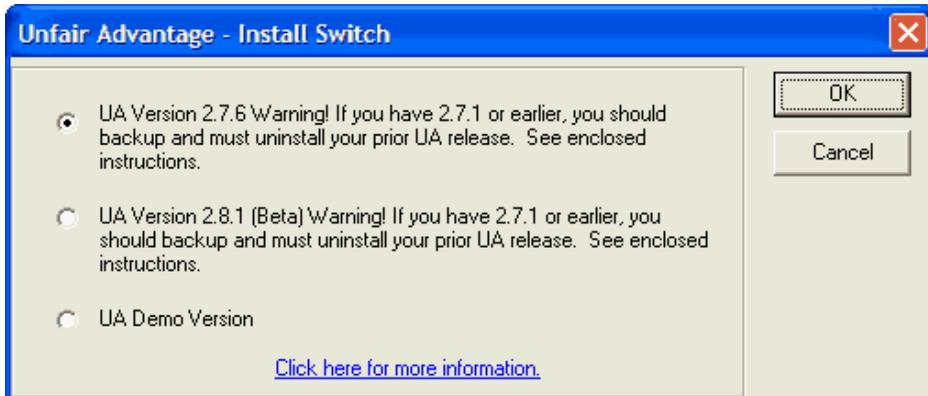
To begin, simply power up your computer and, with no other programs running, insert the Unfair Advantage CD-ROM. Most computers are configured to automatically launch the CD and begin the installation routine.

If the CD does not launch automatically, you can begin installation as follows: Click your computer's "Start" button, and then click "My Computer." Next double-click on your CD drive (probably D:, E:, F: or G:). The installation will proceed with the selection of the version to install.

If Unfair Advantage already resides on your hard drive, a "Program Maintenance" screen will display, offering the options of modifying, repairing or removing the software. The current version supports using this feature only to remove a previous version. Assuming your computer has recently been backed-up to protect you from any unexpected, but possible problems associated with uninstalling programs, we recommend you select "Remove" to uninstall your old Unfair Advantage. Be sure to read and heed the warning about backing up your computer before clicking the "Delete" button. CSI assumes no liability for this potentially damaging decision. Once your old UA has been removed, the program will terminate and you must re-start the installation procedure from the beginning.

2.2 Selecting the Version to Install

When the Unfair Advantage CD first launches on your computer, the Install Switch screen displays offering the choices of installing the current full version, perhaps a Beta Test version, or a Demo version.



Whether you have opened a new account with CSI or are engaging in a free trial, we recommend you install the default (pre-selected) choice. The version numbers will slowly progress to higher numbers as the product matures, functionality improves and features are added.

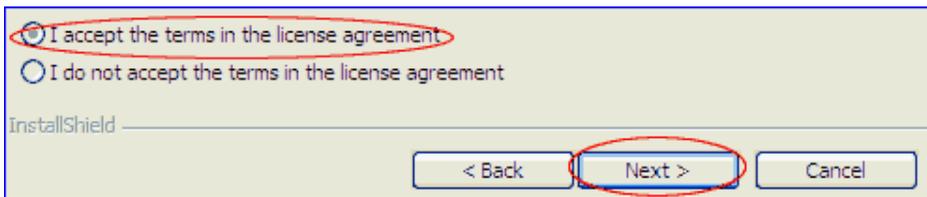
The Demo Version is comparable to the one available from the CSI website. It offers limited access to commodity data. Given a choice of loading a full version or demo version, the full version is almost always your best choice.

A "Beta" (test) copy of an upcoming version may be available, but should be selected only by those who are willing to accept and report unexpected problems. Not recommended for new users!

Click [OK] to proceed with the chosen version.

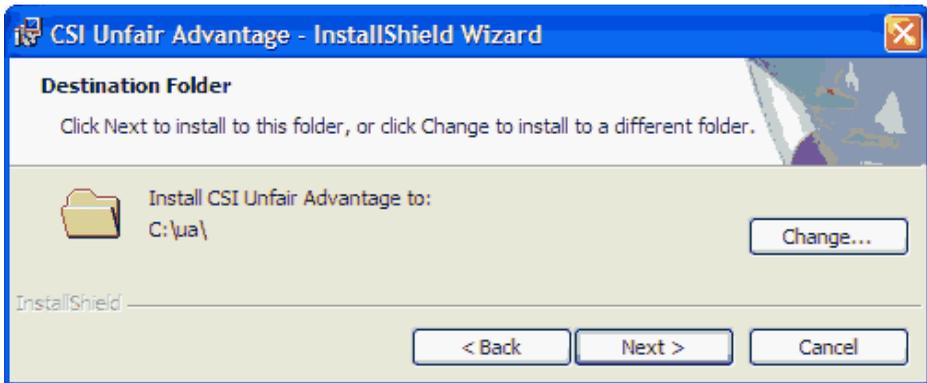
2.3 License Agreement

The current CSI UA License Agreement and Conditions for Use displays. Please read this document now. If you accept the agreement and terms, click the radio button next to "I accept the terms in the license agreement," and then click [Next] to proceed. If you do not agree to be bound by the agreement, installation will terminate. The license agreement may be revised by CSI as time goes by. Please consult the CSI website periodically to view future agreements.



2.4 Selecting the Installation Directory

UA will proceed with the installation routine as follows:



We strongly recommend using C:\UA (the default) as the drive and directory. To do so, simply click [Next]. If you have a specific reason to

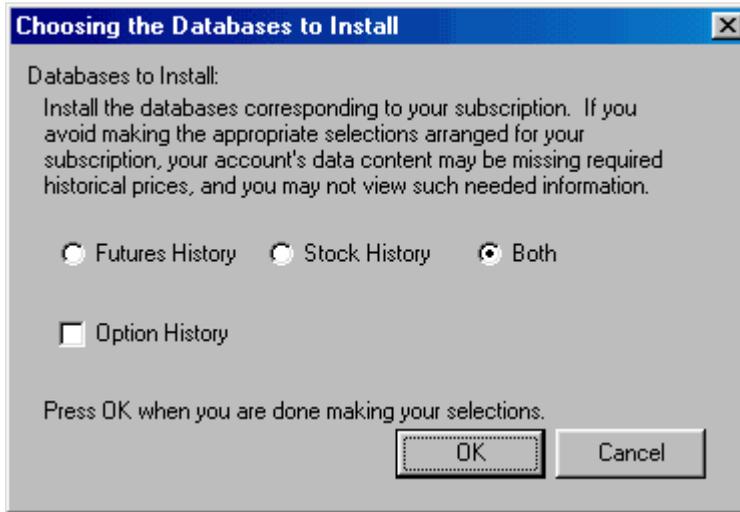
store UA in another location, please keep in mind that this program **MUST** be stored in its own directory or folder (such as C:\UA), not directly in the root directory (C:\). You may use any valid drive for storing the UA software. **DO NOT** store UA in a directory with other programs!

Your choice of installation directory becomes important when and if you ever decide to uninstall Unfair Advantage. The uninstall routine automatically deletes all programs within the directory selected here. Installing UA in its own directory also protects all your software from damage caused by common filenames within the different programs. Please note that networking is prohibited by the UA License Agreement.

If you feel you must select another directory, click [Change] and use the directory tree to navigate to the desired folder. Once selected, that folder will be shown in place of \ua\ on the above screen. As directed, click [Next] to store UA in the listed folder.

2.5 Choosing the Database(s) to Install

The next UA installation screen asks you to choose the databases to install:



This selection refers to the historical data that will be stored on your computer's hard drive. Although the UA CD holds all history on all markets, you will only be able to access and maintain the markets that are installed on your hard drive, and that correspond to your subscription category from CSI.

You selected your subscription category when you signed up for service with the CSI Data Retrieval Service. That category was for retrieval of daily updates of commodities only, stocks and funds only, or a combination of the two. Also upon subscription, you specified your preference for receiving or not receiving options data.

It is important to understand that your subscription category controls not only which files are updated on a daily basis, but also which

historical data you can access through Unfair Advantage. Please use care in selecting the appropriate database or databases for installation so that your choice corresponds with your selected daily update service.

If you subscribed to CSI for stocks, funds or both, select "Stock History." Similarly, if you subscribed for commodities only (either domestic or world), select just "Futures History." For all markets, select "Both." If options are part of your subscription category, be sure to check "Option History" by clicking the box. The various databases may be provided on separate disks. You will be prompted to change disks as necessary.

Upon selecting the appropriate database(s), click [OK] to proceed.

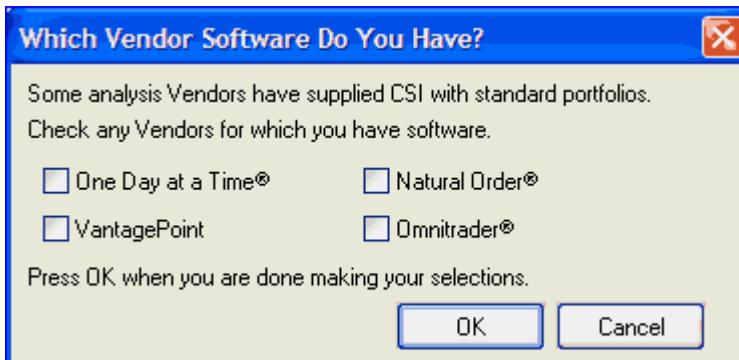
If you do not install a necessary database, you can return to this screen later by repeating the installation process, but only within the first month after receiving the software. After that installation, you'll need to re-collect daily updates from the date the CD was created (a time-consuming process). If you wish to install a database more than one month after the CD was received, you'll need to order a new CD from CSI. This is necessary because the database you add must be brought current, which is only practical through a new CD.

If, upon receiving the UA CD-ROM, you decide to install different databases and change subscription categories, you must notify CSI before your first daily update. If you are unsure of your subscription category or wish to make a change, please call the CSI Bookkeeping Department at 1-561-392-8663. Personal and Private users may purchase additional years of history at any time. The depth of history available is controlled by a switch at CSI, so changes in history start date do not require a new CD. *CSI offers different subscription categories to accommodate the specific needs of our customers. The subscription categories and their prices are listed on CSI's website at www.csidata.com.*

2.6 Selecting Portfolios

UA allows you to maintain multiple portfolios or export directories, each of which is a list of normal, computed and/or continuous contracts or stocks to be followed on a regular basis. They typically hold the nearby current contracts of several commodities, plus computed contracts such as adjusted continuous and cash or stocks.

Some software vendors have supplied CSI with portfolio selections that are compatible with their software. UA will display a list of vendors who have supplied standardized portfolios as shown:

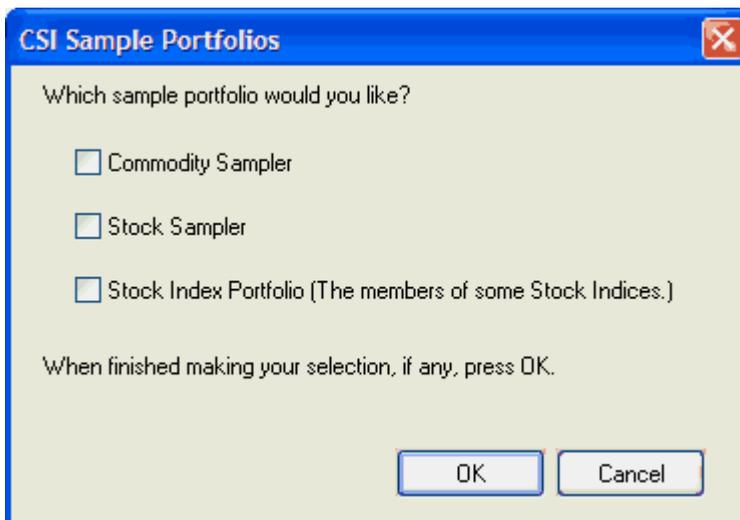


If you use any of the software systems listed, check the appropriate boxes by clicking them, and then click [OK]. (Current offerings are shown in the above example, but more may be added.) When these portfolios are selected, all necessary market selections, contract specifications and export formats are automatically handled by the software.

Depending upon the software program(s) you have selected, if any, additional customization screens may display. Please complete the screens as appropriate for your applications. CSI maintains a current portfolio file for each of the above, (and possibly more) on the CSI website. These can be downloaded according to vendor instructions.

Sample Portfolios

If you don't select any of the Vendor portfolios, sample portfolios will be offered. Sample portfolios are provided to get you started with general charting and analysis. Feel free to use any or all of the portfolios provided with your original CD. The Commodity and Stock Samplers are recommended. The Stock Index Portfolio includes hundreds of stocks and may be cumbersome.



If you don't select any portfolio from the above choices, UA will be installed with no initial portfolio. This might be appropriate if you have saved a portfolio from a previous installation, want to import a portfolio or if you prefer to enter one or more custom portfolios from scratch.

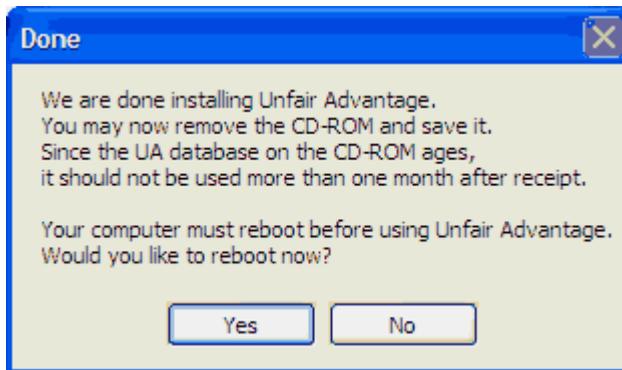
Don't be too concerned about getting your portfolio exactly right at the beginning. The one you select can be modified at any time, and you can add or delete portfolios as needed. Contracts and stocks that are not in your portfolio can still be viewed through UA.

Select the portfolio(s) of your choice, then click [OK] to proceed.

The UA files will be copied to your hard drive. You may be asked to switch disks to accommodate various databases and the copying process may be lengthy (five to ten minutes). Please wait for UA to display one final installation message.

2.7 Rebooting UA

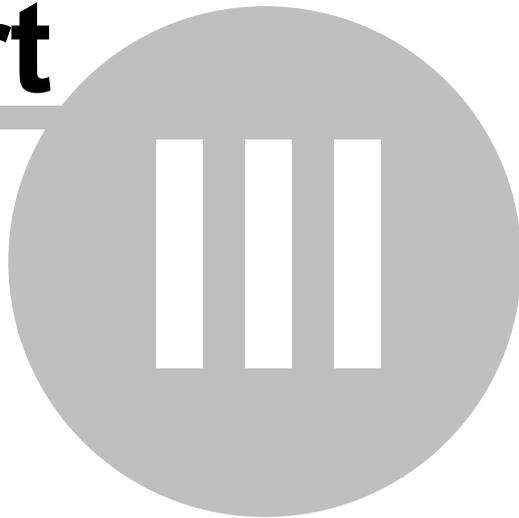
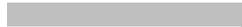
A message displays after installation is complete asking you to reboot your computer:



We have found that rebooting the system at this point greatly reduces the possibility of software failures, making it well worth the effort. Click [Yes] to automatically shut down and restart your computer.

Next the InstallShield Wizard will indicate that the installation is complete. Click [Finish] to exit and the rebooting will commence. Once your computer is rebooted, you'll be ready to use Unfair Advantage for the first time.

Part

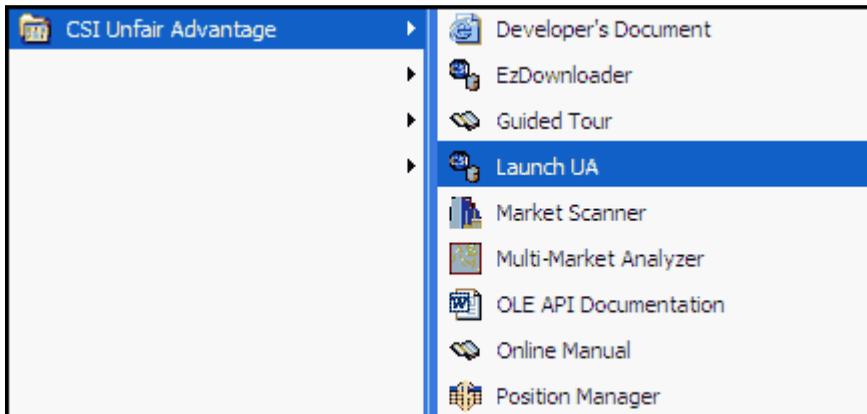


3 Using UA for the First Time

3.1 Launching Unfair Advantage

You may launch the Unfair Advantage program from your computer's Start menu as follows:

Click your PC's Start button, then choose All Programs (or Programs). Move to CSI Unfair Advantage and, finally, click Launch UA, as shown below:

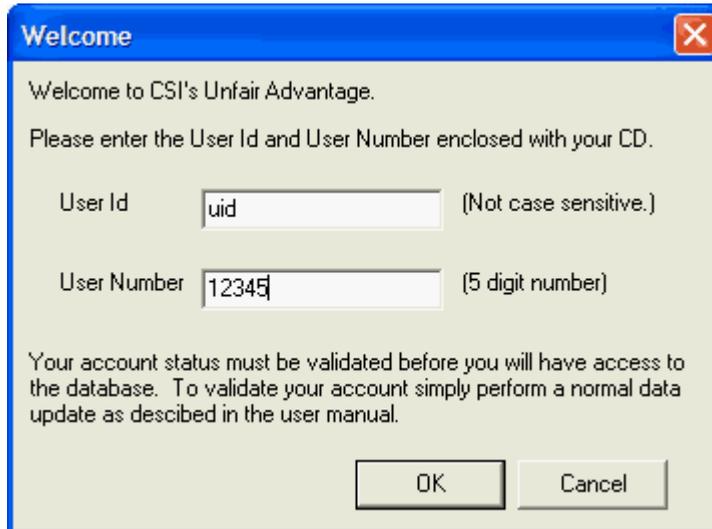


Either upon initial installation or after several uses, Windows XP and similar programs will automatically add "Launch UA" to the Start menu. Once there, you can launch the program by clicking it directly.

You can add "Launch UA" to the Start menu manually by right-clicking "Launch UA," above, and then clicking "Pin to Start Menu."

3.2 User ID and User Number

The first time you launch Unfair Advantage, the following displays:



Welcome

Welcome to CSI's Unfair Advantage.

Please enter the User Id and User Number enclosed with your CD.

User Id (Not case sensitive.)

User Number (5 digit number)

Your account status must be validated before you will have access to the database. To validate your account simply perform a normal data update as described in the user manual.

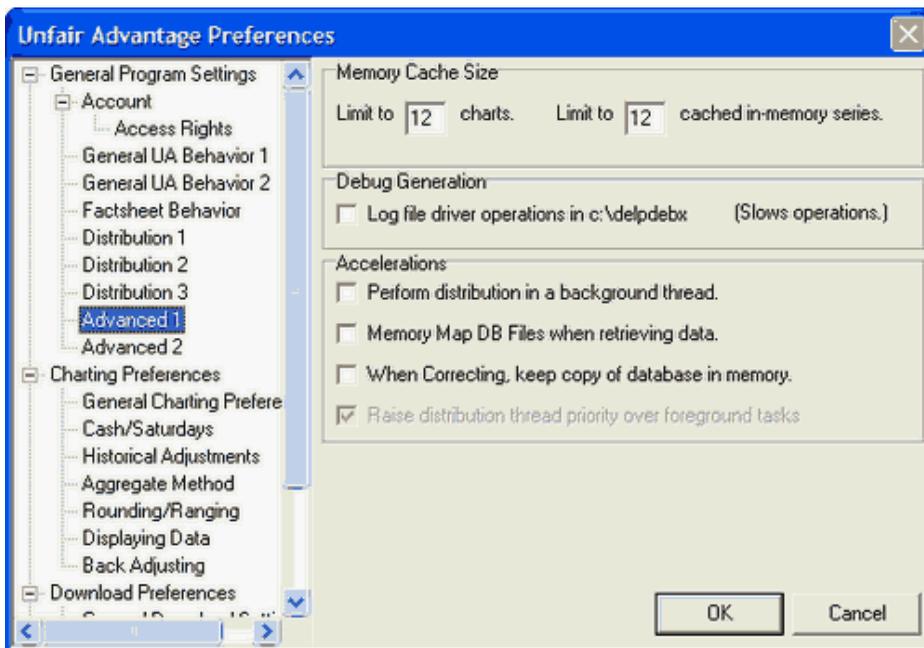
OK Cancel

Your User ID is a three-letter code and your User Number is a five-digit number, both of which are printed on a sticker inside the Unfair Advantage CD package. Enter your User ID, then press the <Tab> key (not <Enter>) to advance to the User Number box. Type your number, then click [OK]. You may edit these entries later through Unfair Advantage Preferences, under General Program Settings - Account.

You are responsible for all accesses on your private account, so be sure to safeguard your User ID and User Number. They represent the security measures preventing others from charging data collection against your CSI account, which is limited to access from a single computer without incurring additional costs. Because it would be possible for one user to grant service to an acquaintance by loaning the installation CD-ROM, this facility protects CSI from unauthorized service usage.

3.3 Accelerations

When your User ID and User Number are complete, the UA screen displays with your portfolio at the left and a blank charting screen to the right. The Main Menu displays across the top. Now you should customize UA Preferences to assure the fastest downloads and distributions possible, beginning with your first update. Click "Preferences" on UA's Main Menu, and then click "Advanced 1" as shown:



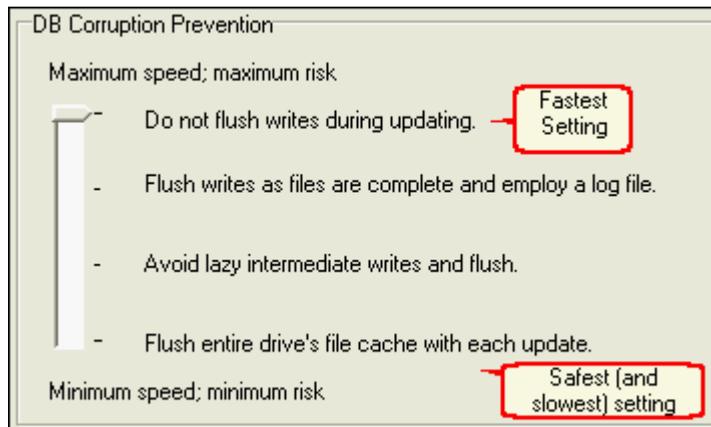
Advanced 1 Recommendations

- **Perform distribution in a background thread** - Click here so UA and other programs will operate more smoothly, and with slightly better performance. (May cause problems for laptops.)

- **Memory Map DB Files when retrieving data** - Click here to improve performance while rewriting files in your portfolio, especially if you use Windows NT. (Requires at least 15 MB of free memory.)
- **When Correcting, keep copy of database in memory** - This feature significantly improves the speed of distribution by storing temporary information in memory instead of on disk. Free memory requirements are: 5 MB for futures, 10 MB for stocks, or 60 MB for options.
- **Raise distribution thread priority over foreground tasks** - If the top choice is used (Perform distribution in a background thread), you can further enhance performance gain through this feature. It will make your computer less responsive to other programs.

Advanced 2 Recommendations

Next click "Advanced 2," on the UA Preferences screen. It offers four levels of progressively conservative (and progressively time consuming) settings, as shown. "Flush writes as files are complete and employ a log file" is the default selection. It is the second fastest setting and is a relatively safe and relatively speedy choice.



For faster updates, use the top choice, "**Do not flush writes during**

updating." This setting is recommended if speed is a high priority and regular backups are maintained. Be aware that if a hardware or software failure occurs during data distribution, most, if not all, of your UA database will be lost and you will need to restore the full UA system from your recent backup and then re-collect to bring your database current. If you want to upgrade speed with this feature, click on the pointer and drag it up to the top. Click [OK] to proceed.

3.4 Downloading Quotes

Once your desired accelerations have been recorded, you're ready to download quotes. The required settings for downloading depend upon your desired method of access. Unfair Advantage is shipped configured for Internet access. If you are a regular Internet user, you may be able to quickly get online without any additional customization as described below. If these instructions are insufficient for your Internet applications, or if you wish to use Direct Dial or Browser access, please see the detailed instructions in the full manual, which is accessible through the Help Menu.

Data Access Times, Frequency & Speed

Before you download, please consider the time of day and recognize that today's update may not yet be available for all markets. Consider also that some updates may contain "preliminary data." To see which markets have been updated for the current day, click the "Database" menu at the top of the UA screen and then select "View Posting Status." Only those markets shown with a blue dot have been updated for the current day.

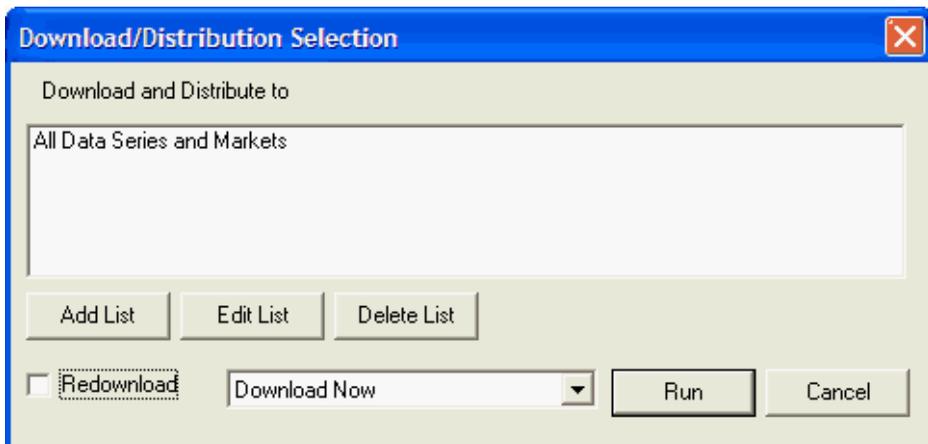
You may download multiple times throughout the day (on the same computer) to retrieve additional markets as they become available. Preliminary stock data may be available as early as 4:45 p.m. E.T. We recommend that preliminary stock data be verified with a subsequent "official" update before making trading decisions. You should update at least once daily to avoid lengthy downloads.

Each update session retrieves the most recent day and a refurbished repeat of the previous day. All missing days of trading activity since your last update (for a period covering up to two months) will also be included. The transmission can also include error corrections and new information. Updates of the commodity database typically take no more than two minutes per day of data. Stock updates take significantly longer, particularly when collecting Friday's data, as additional fundamental data is transmitted at that time. The time required for your first download will depend upon the number of days updated and the scope of your database. A lengthy data series of a month or more or involving many market types may take two hours or more.

For Internet access:



With your computer online and the Unfair Advantage screen displaying, click the "Download New Quotes" icon on the toolbar. It's the first icon on the left, and resembles a globe. This icon represents the World Wide Web. The Download/Distribution Selection screen displays as shown next.



This screen allows you to download and distribute everything in your retrieval category or a subset that can be defined through a list. For your initial retrieval session, simply click [Run] to download and distribute everything.

Next, the Download Data Communication Settings screen will display with an "Internet Download" confirmation box superimposed as shown:



Depending upon your communications software, you may have to click "Connect" or "OK" to initiate a dial-up internet connection, or this may happen automatically. Either way, once the connection is established, the "Internet Download" screen will display, but it may be hidden behind your home page. Feel free to minimize the home page screen to view the full Unfair Advantage process.

Assuming you entered your User ID and Customer Number correctly and you have not waited beyond the expiration date on your CD, Unfair Advantage will bring your full database current.

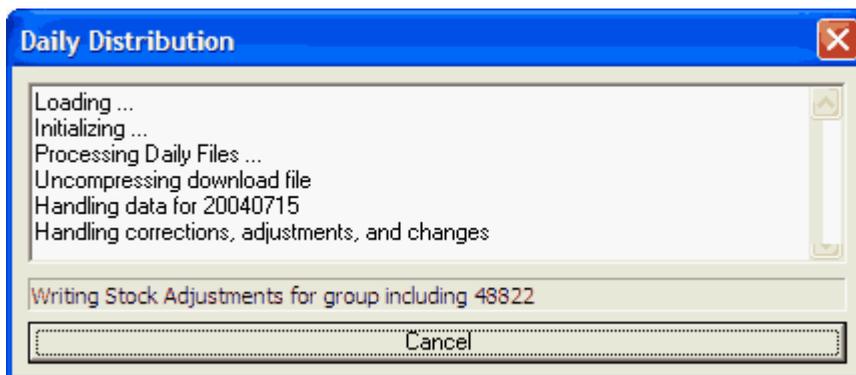
3.5 Data Distribution

UA proceeds to data distribution after a retrieval session. Data distribution is the process of appending all the current data received in your download transmission to the compressed database stored on your computer's hard drive, as well as writing output files in your portfolio. It is a necessary step in maintaining a sound database. *A connection to the Internet or a telephone hookup is not needed during the distribution process. If it is important for you to minimize online time, you may manually terminate the connection any time after*

distribution has begun. You can arrange for automatic termination of your Internet connection through the "Distribution 1" screen of General Program Settings from the UA Preferences menu.

By default, the distribution screen (shown below) chronicles UA's progress. It shows the date for each day processed (in a 4-digit year, month and day format) and identifies the actions taken for that day, starting with your last update and proceeding through to the most recent day available.

"Applying daily price updates" displays while UA is appending existing files. If you are downloading stock data, a summary of advancing and declining issues can also display. Your portfolio(s) will be built from scratch during your first distribution process, so please allow several minutes for your initial portfolio build.



The [Cancel] button at the bottom of the distribution screen changes to [Finish Distribution Later] as the process nears completion. Click either of these buttons if you absolutely must stop the distribution process. In either case, you should perform a manual data distribution before your next retrieval session to avoid an unnecessary download. Note that distribution will resume at the same spot next time only if [Finish Distribution Later] is used.

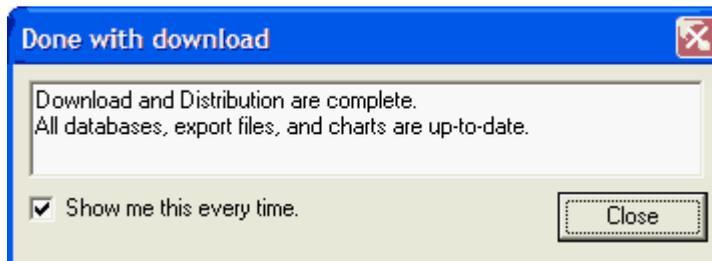
News Headlines

During distribution, UA takes you to the News Headlines page of CSI's website. If you are interested in the stories mentioned there, simply click on the links to view. Click the X at the top right to close this window.

Error Corrections and Revisions

By default, Unfair Advantage lists all markets that receive corrections and revisions during data distribution. "Corrections" can include any data bit that modifies a data file. True corrections are infrequent due to the rarity of errors in CSI data transmissions. Dividends, stock split ratios, changes to "Facts of Interest" and changes to the factsheets are transmitted as "corrections" and will eventually be held in various files (all ending in .adm), which are located in the UA\Archives directory. In the future, if you do not wish to view corrections and revisions after distribution, simply turn the "Display Update Report After Distribution" feature off through the "Distribution 1" screen in General Program Settings, from the Preferences menu.

The "Done With Download" message will display:



Click [Close] to clear this message. If you don't want to view it in the future, click the box next to, "Show me this every time," to remove the check.

3.6 Navigating Through Unfair Advantage

Once the download and distribution are complete, the full scope of Unfair Advantage capabilities will be available. Here's a navigation guide.

Across the top of the screen are topics for pull-down menus, which constitute UA's Main Menu:

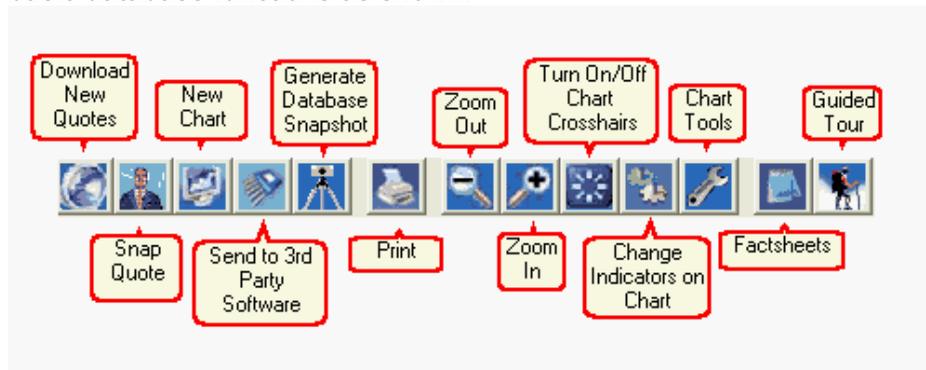
File Portfolio ChartTools Database Trading Tools Preferences Window Help

(File, Portfolio, Chart Tools, Database, Trading Tools, Preferences, Window and Help).

Click on any of these for an additional list of features.

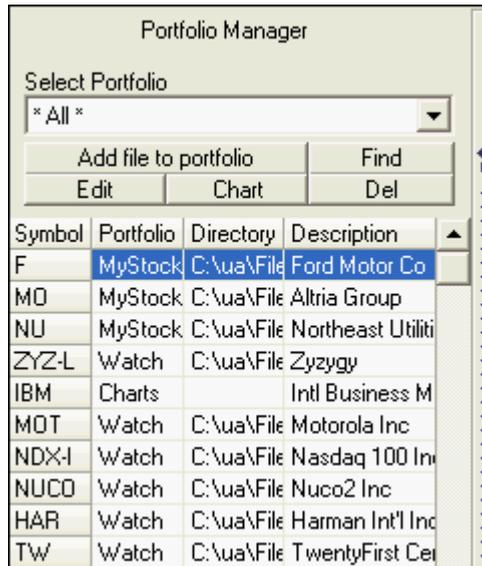
Below the Main Menu is a toolbar that provides an alternate method of navigating through the software. Each represents a different aspect of using UA.

From left to right, the first six icons and the last two icons deal with basic database functions as shown:



Place your cursor (without clicking) over any of the icons to display a description, then click on your choice. *The remaining five icons deal with charts, and are explained in the next topic.*

On the left side of the UA screen is the Portfolio Manager panel, as shown:



The "Select Portfolio" box lists the active portfolio (or "All" for all portfolios), whose content is listed in the panel. The buttons within this panel are used to add files to the portfolio, edit contract specifications, display charts and delete portfolio items. The right-hand window of the Unfair Advantage screen will display charts and tables. These functions are described next.

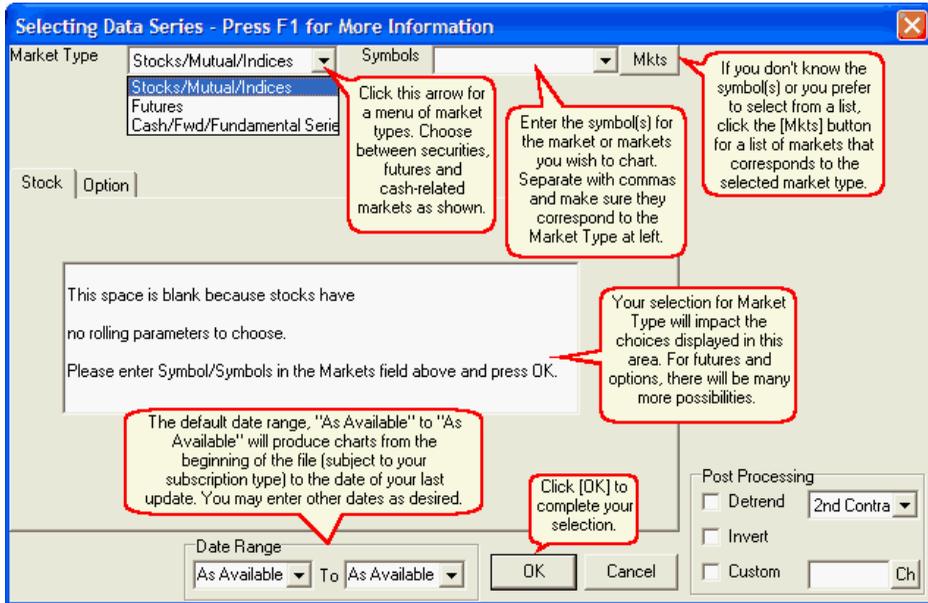
3.7 Creating Your First Chart

Click any entry in your portfolio list, and then click the [Chart] button just above the list to display a chart.



If you don't have a portfolio or you want to chart something that

isn't in your portfolio, you can create a chart by clicking the chart icon on the toolbar (third from left). The following screen displays:



As shown above, first you'll select the appropriate "Market Type," and then either enter or select a symbol. If you have requested a futures market, you'll need to pick a contract type (such as back adjusted).

Click [OK] to accept all the default choices for your first sample chart as shown here:



In our chart example, the title at the top of the chart tells us that this is a back-adjusted corn contract. This screen shows about a year of data, but it could easily show the full ten years that were provided with your subscription. The number of days displayed initially is controlled through the "Preferences" menu under "Default Zoom Level" in General Charting Preferences from the Preferences menu. CSI's corn data goes back to 1949, so "Professional" users and others who purchased access to additional data can see the long history of corn trading by scrolling left.

The main body of the chart (upper portion) displays the trading price, and the lower window displays volume and, for futures and options, open interest. The price is interpreted through the vertical scale at the right.

Chart Properties

If this chart was created from a portfolio listing, you may find out more about it by viewing the chart Properties. See them by simply right-clicking the source contract or stock on your portfolio list and then clicking "File Properties" from the menu.

The settings used to create the portfolio item display. They give all details about the series, including the type of contract (computed or normal month), the type of adjustment method used for continuous series, whether or not detrending was used, the date range, chart periodicity, applicable file formats and more.

Selecting Data Series - Press F1 for More Information

Market Type: Futures Symbols: 9C Mkts: _____

Contract Months To Include:

	X		X		X		X		X		X
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

All None

Normal | IFG | Nth Nearest | Back Adjusted | Cash | Option | Perpetual | Gann

Roll Trigger:

- Open Interest
- Volume
- Open Interest And Volume
- Open Interest Or Volume
- Date
 - 10 Days From: Start of Month
 - 1 Months Prior

Roll By Days Before Expiration: 0

Generate Forward

Roll Timing: Aligned with Price Data (Close to C)

Representative Prices: Close Old Contract, Close New Co

Accumulation Method: Back Adjusted

Confirmation Signals: Roll On Second Consecutive Trigg

Date Range: 19490103 To As Available

File Export Preferences:

Portfolio: _____ New

File Format:

- ASCII Preferences
- CSI
- CSIM
- MS Format
- Excel

Periodicity:

- D W M

Post Processing:

- Detrend: 2nd Contra
- Invert
- Custom: [1/\$(Open[Ch

OK Cancel

This example tells us that this is a back-adjusted contract, rolling from one contract to the next based upon changes in open interest. All of these settings are explained in the Portfolio chapter of the full manual. Click [OK] or [Cancel] to close.

3.8 Manipulating Your Chart

UA offers a full complement of charting capabilities, as described in the Charting Chapter of the full manual. These basic functions will get you acquainted with UA's charts. Use the toolbar above the chart to:



Create a New Chart (not listed in your portfolio).



Zoom Out - This feature compresses the spacing of the price bars, contracting the data into a smaller, more compact form. Very contracted charts may have considerable overlap, which tends to obscure pricing details and studies. Check the calendar at the bottom of the chart to see the date range currently displayed and use the scrollbar to see the rest of the chart.



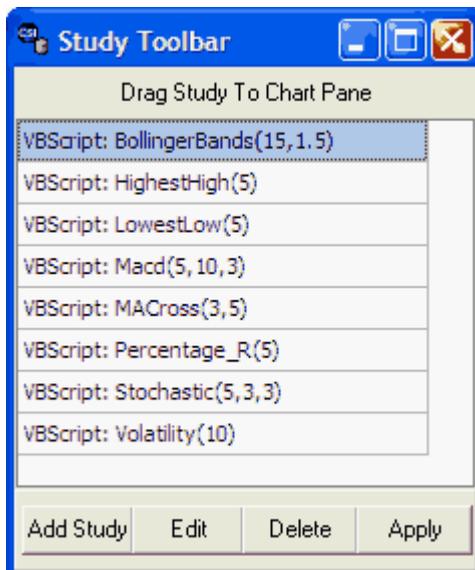
Zoom In - This reverses the above process, allowing you to see more details on your chart. Each time you click the button, the chart itself expands, but the time period visible on the screen gets smaller.



Crosshair - Click this button to add a crosshair pointer to your screen. Use your mouse to position the pointer anywhere on the chart. A data window showing complete numerical market data for the corresponding day also displays. Click the button again to remove the crosshair and data window.



Change Indicators - Click this button to add studies to your chart. Those offered here include: Moving Average Crossover, Stochastic, MACD and others as shown below. The list can change as you add and delete studies of your choice. When this menu displays, your chart window is split into four panes for possible study placement.



To place one of these studies on the active chart, click the study name in the "Study Toolbar" menu and then click [Apply]. You will be asked which pane should hold the study, and you may select any of four panes, which are ordered from top to bottom, with 1 representing the top pane. You may superimpose the study on your bar chart by selecting pane 1, or select an empty pane to display the study alone. Alternately, you may "drag" the study name to the pane of your choice.

The chart will be redrawn with the study using the parameters shown. You can view and edit these parameters by clicking the [Edit] button and making changes where appropriate. In the example above,

"VBScript: BollingerBands (15, 1.5) refers to the Bollinger Bands algorithm run in Visual Basic.

You can also choose other studies, including those from the Advanced Studies library by clicking the [Add Study] button and then clicking [Interpreted] on the "Select Study" screen. This is the gateway for more analysis tools and user-defined, custom studies as described in the full manual. Use up to two studies. The chart will redisplay using optimal spacing when the Study Toolbar is closed.



Chart Tools - Click this button to add a Trendline, Annotation, Rectangle, Ellipse, Gann Fan (with or without reflection) or to Zoom By Box or Unzoom Previous Zoom.



Print - Click this button to print your chart or table.



Chart/Table - From the tabs at the bottom of the screen, select your choice of chart or numerical table to display data. The table gives access to UA's data editor for manually entering price changes or additions.

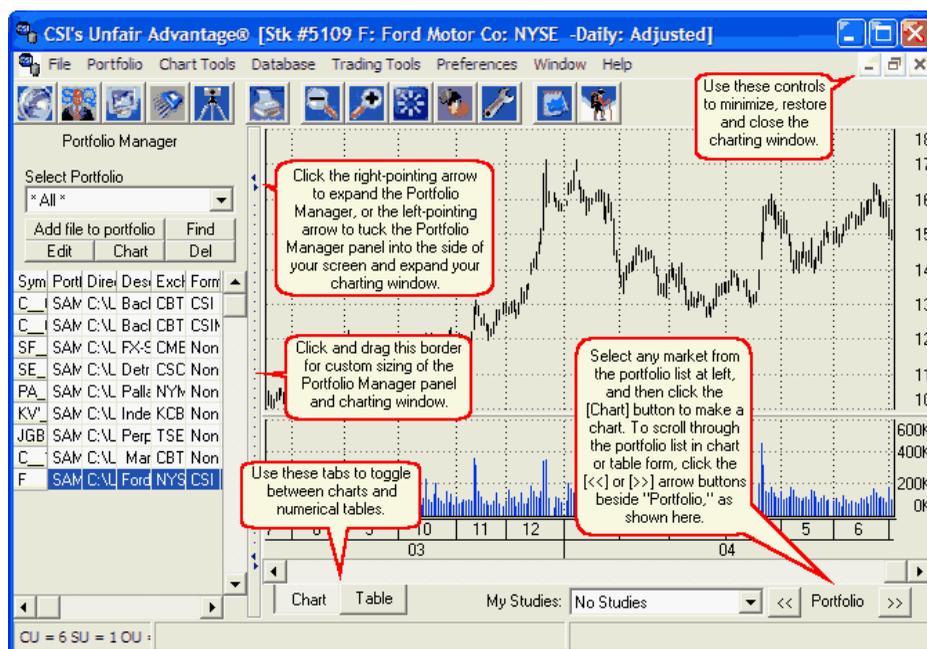


Contract Selector - Use these buttons to scroll through charts of the items in the selected portfolio. Click the right button (below chart) to display the next chart on the portfolio list. Click the left button to go back.

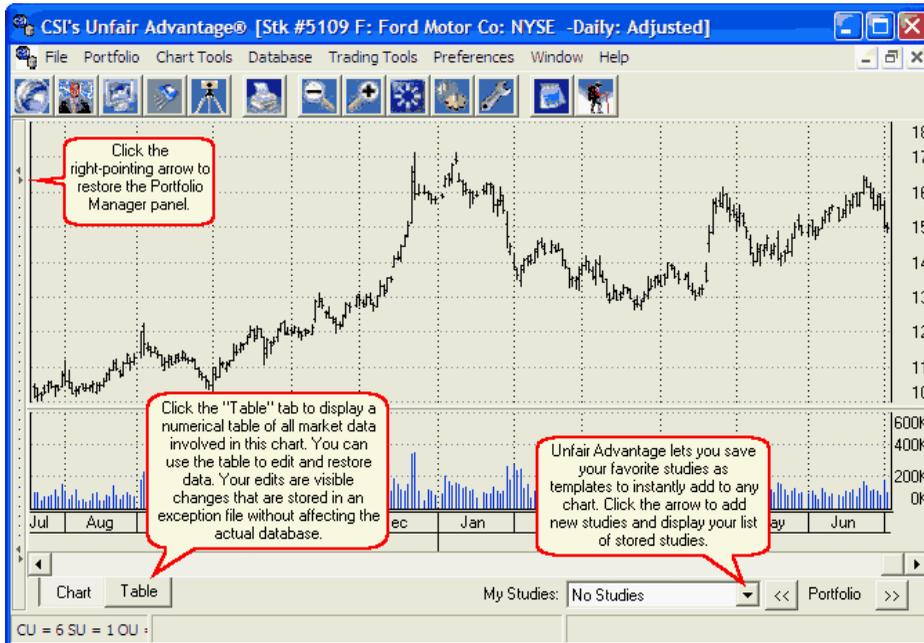
Windows

You can add charts to your screen by selecting them from the Portfolio list and clicking [Chart]. Click on the "Window" menu at the top of the Unfair Advantage screen for a list of choices for your charting window. It allows you to select the chart to view, rearrange charts or to display them as tiled or cascaded.

Here is a graphic example of more chart manipulation:



When the Portfolio Manager panel is minimized (either by dragging the right edge to the left margin of the screen or by clicking the left-pointing arrow at the right boundary) the charting window can almost fill the entire screen:



You can restore the Portfolio Manager panel by clicking the right-pointing arrow at the left edge of your chart.

Additional charting is available through Unfair Advantage's MarketScanner and Trading System Performance Evaluator (TSPE), which can be launched through the "Trading Tools" menu. Intraday charts are also available through Position Manager. Other third-party software analysis is also possible with data retrieved and maintained through Unfair Advantage as explained next.

3.9 Viewing with Third-Party Software

Third-party software refers to analysis programs outside of the Unfair Advantage environment, such as MetaStock, VantagePoint, Delta Graphics, One Day at a Time, Excel and other analysis or spreadsheet programs. These third-party programs read data files that have been exported by Unfair Advantage. Export format files are placed on your hard drive so that they may be accessed for analysis by your third-party programs. Once these files are written, you may exit UA and perform analysis as directed by the respective software makers.

Unfair Advantage will automatically create and maintain export format files that are specified in user portfolios. Users of some programs will have arranged for automated portfolio creation during setup. These portfolios are customized for export without additional manipulation or input from you.



UA lets you specify CSI, MS, CSIM, Excel or ASCII format files for additional contracts and stocks through the "Send to Third-Party Software" icon on the UA toolbar. You can specify the necessary export formats and destination directories by clicking the icon and providing the required information. Unfair Advantage will save your input for future updates of your export format files. If you need data for third-party programs, please check their reference manuals or call support to find out which of UA's formats should be used. ASCII files are often a good choice for compatibility with multiple analysis packages.

Please note that MetaStock users should export to the MS format to assure full compatibility with that program. Due to the complex file structures of CSI, MS and CSIM formats, you should not attempt to manipulate these files through Windows. Use the appropriate CSI or MetaStock-compatible program to move, delete and edit these files.

Disappearing Unfair Advantage

Some vendors of market analysis programs have arranged through CSI to include data retrieval with Unfair Advantage as part of their products. These third-party programs have a menu selection, button or screen prompt that initiates a CSI download and then automatically and invisibly uses UA to deliver data and maintain pre-specified portfolios. With this setup, a CSI subscriber can arrange for updates and install the UA software, but subsequently use only the third-party analysis product for daily applications.

If you would like your third-party software to support this CSI service, please ask the supplier to contact CSI. Our staff will work with them (free of charge) to facilitate a seamless interface for you.

3.10 Intraday Updates

CSI offers daily update service through the Unfair Advantage software which provides daily summary quotes after the close of the markets. CSI does not sell or redistribute real-time information. However UA's SnapQuote service (on the Database menu and the toolbar) and Position Manager module (on the Trading Tools menu) direct your Internet browser to third-party websites from which it may gather intraday quotes. These real-time or near real-time quotes, which are typically 20-minute-delay data or ECN only, may be used to track intraday account equity and help you time market entry and exit points. These free services are offered on a trial basis. Future availability is not guaranteed.

We call the intraday update process capturing "external" data, because this data does not pass through CSI's normal cleaning and clearing process. CSI makes no claims about the accuracy, timeliness or completeness of this data. SnapQuote prices are incorporated into UA as estimated current-day values. When you retrieve a normal daily update from CSI after the markets close, our high-quality, meticulously checked data replaces the estimated values.

Intraday Quote Delays

- U.S. Stocks – real time
- North American Futures – 20-minute delay
- Other markets, including mutual funds - updated with most recent close price in the CSI daily database

SnapQuote



Unfair Advantage can collect intraday SnapQuotes for your portfolio (a recent open, high, low, last, and volume data) for the current day with the click of a button (second from left on the toolbar).

Click the "SnapQuote" button on the UA toolbar to pick up intraday quotes. The "intraday" box in the Portfolio Manager is used to determine which markets, if any, will be updated during a SnapQuote session. You must click the "Intraday" checkbox at the far right side of the Portfolio Manager for each market you wish to update intraday.

Position Manager

Launch Position Manager by clicking UA's Trading Tools menu and choosing "Position Manager." An empty spreadsheet will display. If your UA system already includes portfolios you would like to view intraday, you may simply import them by clicking Position Manager's File menu and selecting "Import Trades." Then select "UA Portfolio" and the desired portfolio from the list that displays.

Each symbol will be added to the Position Manager spreadsheet as in the following example. If you want more than a watch list, you'll need to edit the new entries to identify the shares or contracts owned, the "in price," commission, etc. Only normal (not computed) futures contracts can be added through the import feature.

Note that the data source is listed at the right side of the screen. Any time the "Source" is listed as "CSI," the data shown represents the last closing price stored in your daily UA database, not an intraday quote. CSI reserves the right to modify the delay values or revert to end-of-day updates for all Position Manager prices should third-party sources limit or restrict access to intraday information.

Symbol	Name	Quantity	In Date	In Price	Out D	Out P	Stop	Commis	Break Even	Current	Profit/Loss	Source	CF	Size
F	Ford Motor Co	Short 500	7/7/00	24.12				30.00	24.06	11.60	6230.00 USD	Yahoo		
GE	General Electric	Short 300	11/19/02	41.00				30.00	40.90	29.77	3337.50 USD	Yahoo		
W-Z-C330	Wheat-CBT(day)	Long 1	5/28	26^2				40.00	27^0	44^2	860.00 USD	CSI	-1	500
W-Z	Wheat-CBT(day)	Long 1	5/28	335^0				40.00	335^6	370^6	1747.50 USD	INO	-1	500
Balance		21468.75		Equities	21468.75	Buy	21468.75			Total	12175.00 USD			

Alternately, you can add markets individually by clicking the "Positions" menu and selecting "Add."

Symbol Selection

Market: Future Option
 Type: [dropdown]
 Symbol: w
 Browse... [button]

Contract: 200405
 Strike: [dropdown list showing 200405, 200403, 200312, 200310, 200309, 200308, 200307, 200306]

OK [button] Cancel [button]

Enter the desired symbols and make any necessary additions. Do not attempt to add markets by simply typing them into the spreadsheet, as this will cause a program error. Click the "Settings" menu at the top of the Position Manager screen and then select "Preferences" so that you can identify your preferences for Internet updates, units for price quotes and for account margins.

Part

IV

4 Portfolios

4.1 Understanding Portfolios

A UA portfolio could be defined as a directory designation plus compatibility settings for the files within the directory.

UA lets you create and store portfolios that list all the contracts, stocks, options, cash series, COT data sets, etc. that you will be viewing regularly. Your portfolios should include everything you'll want to see in chart form through UA or through third-party analysis software in various formats. By identifying the markets of interest to you in portfolios, you can save a considerable amount of time and effort in your daily analysis because everything you need will be immediately available.

UA lets you control all important parameters used to configure the contracts or stocks in your portfolios and allows you to review or change these entries at any time. This feature is particularly useful when designing your own custom trading system with computed continuous series. Market analysis based on such contracts should never involve a data series built with unknown parameters. Unfair Advantage makes you an active and informed participant in your market study.

Multiple portfolios are used to group investments and to maintain separate lists of export format files for use with third-party analysis programs.

You can add portfolios in either of two ways:

- 1) Click "Create New Portfolio" from the Portfolio menu or
- 2) use the "Import Portfolio" feature from the Portfolio menu.

Although the portfolio system lets you store your desired markets for easy access, it does not limit access of non-portfolio data. You can

chart and/or write files on anything within your subscription category, whether or not it is listed in your portfolio(s). Please refer to the "Customizing Your Portfolio" topic for details on creating and defining a portfolio.

Portfolio Limitations

The markets available for processing through portfolios and the software available for analysis may be restricted based upon your subscription category with CSI.

See your Account Status by placing your cursor at the bottom of the UA screen (on or adjacent to the CU=x, SU=x box) for details on what is available to you.

You can find out more by clicking "Preferences" at the top of the UA screen and then choosing "Access Rights."

The MarketScanner(TM) Alternative

A handy alternative to portfolio selection is UA's MarketScanner, which can automatically list stocks and commodities for charting or other analysis. This module allows you to sort and filter tradeables according to your choice of price, volume or fundamental fluctuation, or on study results.

MarketScanner is started from Unfair Advantage's Trading Tools menu. See the MarketScanner chapter of the online manual through the Help Menu for details. Users of MarketScanner can bypass the standard portfolio feature, or use MarketScanner to select markets for inclusion in your portfolios.

4.2 Portfolio Menu & Manager

Your entire portfolio system can be controlled through the Portfolio menu. Reach this menu by clicking "Portfolio" on the Main menu (second heading from left).



Please note that for many of the functions listed on this menu, you must first select a portfolio from the Portfolio Manager panel. Some features require that both a portfolio and included file be selected. You will be prompted for these as needed.

Use the Portfolio Menu to:

Create a New Portfolio (use to make a new list of markets for similar handling)

Edit Portfolio Settings (set common specifications such as format, rounding, etc. for everything in the portfolio)

Copy Portfolio Settings to a New Portfolio (to use the same settings on a different set of markets)

Delete Portfolio and Files (to remove a portfolio listing and all corresponding files)

Import Portfolio (to add a pre-created list with settings)

Export Portfolio (to export the portfolio listing - currently limited to printer)

Overwrite With Backup Copy (to replace a portfolio with an earlier version)

Minimize Portfolio Manager (to reduce the panel to a border at the left of the screen)

Restore Portfolio Manager (to restore the original screen presentation)

Maximize Portfolio Manager (to expand the panel to fill the screen)

Insert File/Files (add new series to your new or existing portfolio)

Edit File Settings (change the properties of a portfolio item)

Rewrite File Immediately (write an export file to disk now)

Rewrite File on Next Distribution (write an export file to disk the next time you distribute daily data to your database)

Delete File and Settings (remove an item from the selected portfolio)

Chart Series (display the selected series as a UA chart using the portfolio settings)

Find in Portfolio (use to locate a series on your portfolio list)
Select All (select all portfolio items for next action)
Print File List (to make a hard copy listing of the selected portfolio)
Reset Column Widths and Placement (to return UA to its original presentation)

Change Format (choose between chart, ASCII, MS, CSIM, CSI and Excel)

Change Period (make file/chart Daily, Weekly or Monthly intervals)

Enable/Disable Portfolios (to specify which portfolios will be updated)

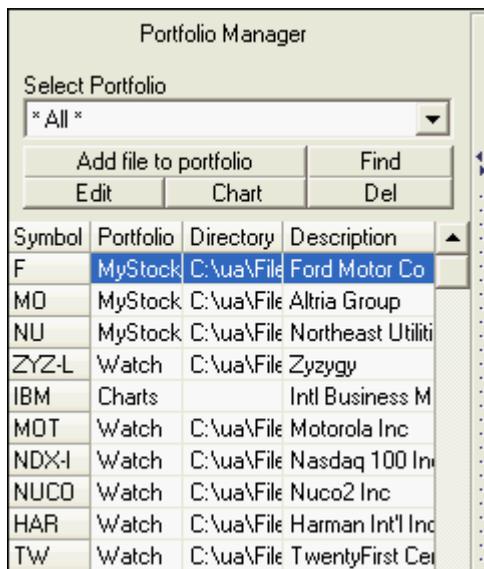
File Properties (view and edit specifications for the selected item)

The Pop-Up Menu

A very similar menu will display if you click on any item in a portfolio and then right-click your mouse. Use whichever method is most convenient for you. The pop-up menu is particularly useful when you have re-sized the Portfolio Manager panel, as it provides additional utilities for adjusting the visible columns and for restoring the original screen presentation.

The Portfolio Manager Panel

The Portfolio Manager panel is found on the left side of your UA screen. The visible portfolio is named in the "Select Portfolio" box at the top of the panel. Click the down arrow at the right of the "Select Portfolio" text box to display a menu of all available portfolios. The "All" option is always at the top of the list. Selecting it will produce a listing of all portfolios simultaneously, as shown in the following example.

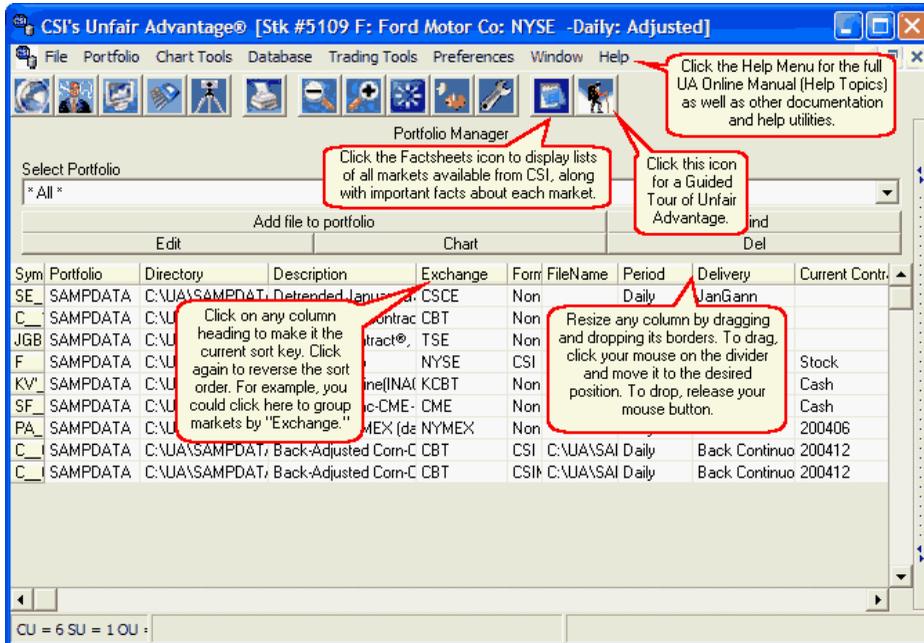


Portfolio Manager Panel Buttons

- [Add file to portfolio] lets you add a new market as explained in the "Customizing Your Portfolio" chapter.
- [Find] lets you enter a search string to locate a market in your portfolio listing.
- [Edit] lets you change the properties of the selected file.
- [Chart] lets you graphically view the selected market, along with any desired studies. This is also used for viewing tabular data and allows access to UA's data editor.
- [Delete] lets you remove the selected market from your portfolio list, and associated files from your computer.

Expanding/Minimizing Portfolio Manager

Click the small right-pointing arrow on the divider between your chart and the Portfolio Manager panel to remove your chart from view and expand the Portfolio Manager panel so that it fills the screen. This will reveal more details about the content of your portfolio(s).



Note that you can scroll through the many entries using both side and bottom scroll bars, and can change the column sizes by dragging the heading dividers to the desired location. The columns can be used to sort your portfolio as desired. Just click any heading to use it as a sort key.

Click the small left-pointing arrow at the right border of the expanded Portfolio Manager panel to restore the chart to your screen. Once the

original screen presentation is restored, you can further minimize the Portfolio Manager panel by clicking the left-pointing arrow again.

Right-click your mouse in the Portfolio Panel for a menu of additional functions, including "Minimize Portfolio Manager," "Restore Portfolio Manager," "Maximize Portfolio Manager" and "Hide Column."

4.3 Customizing Your Portfolio

To create a new portfolio, click the "Portfolio" menu at the top in the UA screen, and then click "Create New Portfolio." This produces the screen below:

Edit Portfolio

Name:

Directory:

ASCII Field Layout	ASCII Misc	Rounding/Ranging	
Historical Adjustments	Aggregate Files	CSI Format Dir Settings	
CSI Format File Settings	CSIM/MS Format Settings	ASCII File Names	
Displaying Data	Back Adjusting	Optional Field	General

Delete Expiring Contracts for Individual Futures Groups. (Not Retroactive.)

Append every day

Vendor Association:

Name: The first thing you'll do is name your portfolio. Simply type a description or whatever name you prefer into the "Name" text box. (We used "MyStocks" in the example.)

Directory: As you type the portfolio name, you'll notice that a corresponding directory name is being inserted into the "Directory" text box below. The directory specified there will be the physical location of all files in your new portfolio. The default location is a directory whose name matches the portfolio name within the C:\UA\Files subdirectory. If you prefer to store this data in another directory, simply edit the directory name.

UA will automatically create the directory if it does not already exist. Another option is to click the [Browse] button and navigate to the existing directory of your choice. If no directory is selected, the content of the portfolio will be immediately available for charting with UA, but will NOT be written to files for use with other programs.

Initial Portfolio Settings

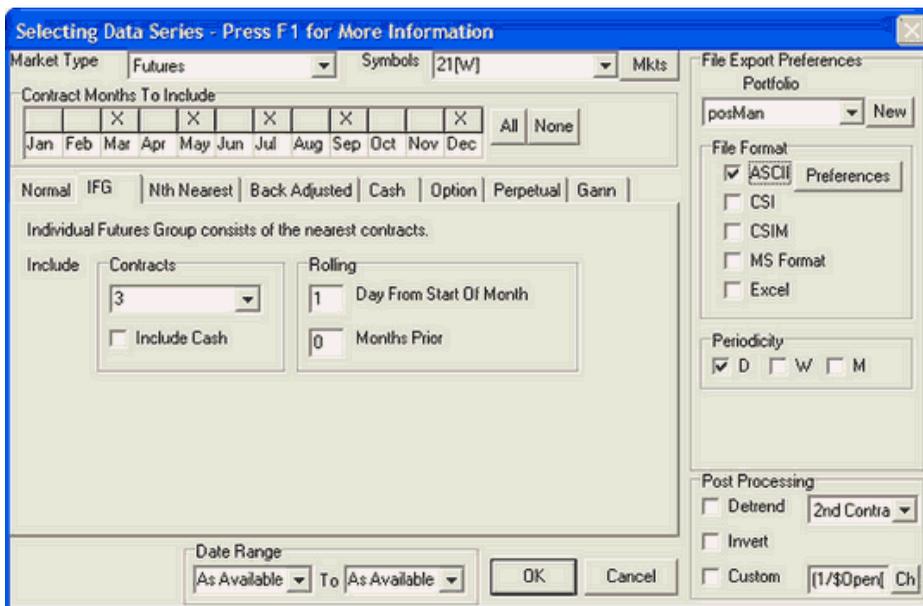
Below the Name and Directory entries, the main body of the portfolio creation screen shows a series of tabbed pages where you can specify your desired portfolio settings. They allow you to choose settings that are tailored to each of your applications.

Portfolio settings are identified during creation, and may be adjusted later through the "Edit Portfolio Settings" feature on the Portfolio menu. Click the tabs to see the default selections for each setting and adjust as desired.

Click [OK] when you have viewed and adjusted the settings for this portfolio.

Once your new portfolio settings have been arranged, a screen for selecting the commodities, stocks, indices and options to be included in this portfolio displays as shown next. If this screen looks familiar, that's

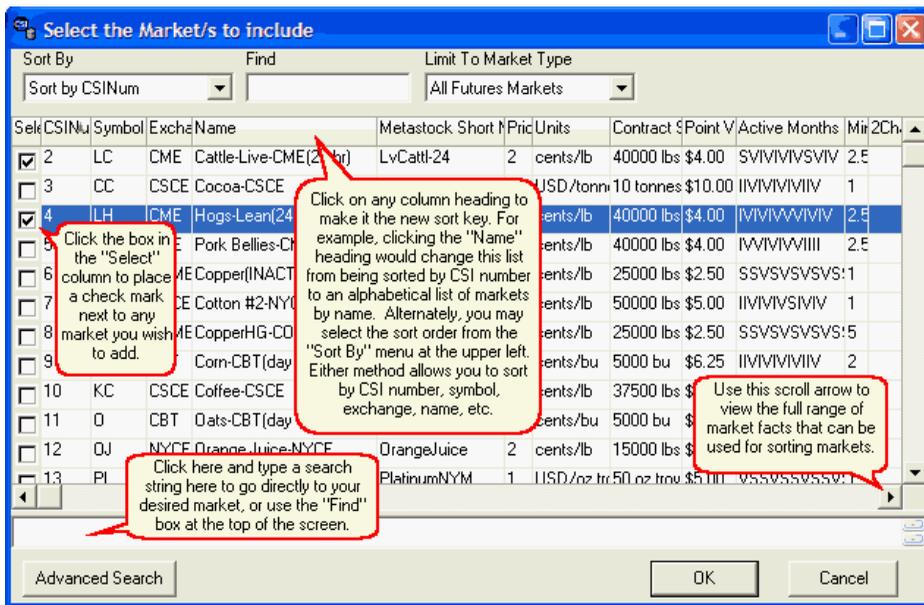
because it is the same one used for viewing chart properties in the "Using UA for the First Time" chapter.



Click the arrow beside the "Market Type" box to display a menu from which you may select from Futures, Stocks and Funds or cash series. Once the Market Type is chosen, you can either type the desired symbols (separate with a comma and/or a space) in the "Symbols" box or click the [Mkts] button to display a list as described next.

Selecting Markets

The market list is actually the Unfair Advantage Factsheet for the selected market type. (This example is for All Futures, but you can fine-tune the selection using the "Limit to Market Type" menu at right.) Scroll through the list and click the check-boxes in the far left column to select your desired markets. Only select those markets for which you want the same contract types, such as Nearest Futures, cash, etc. Click [OK] to proceed.



Contract Selection

Once you have selected your markets, UA returns to the "Selecting Data Series" screen, which offers many choices for contract selection as shown earlier. Possibilities for commodities include Normal Pricing, Individual Futures Group (IFG), Nth Nearest Futures, Back Adjusted, Cash Contracts, Options, Perpetual Contract® Data and Gann

Contracts. Stock choices are more limited, as you'll see. Select your desired contract type by clicking the appropriate tab. The example shows the customization screen for Individual Futures Group (IFG), which is a popular method of following the nearby contracts as individual (non-combined) delivery months. Please see the full online manual for more information about the choices offered here.

Click the appropriate tab for the contract of your choice, make selections as necessary and, after selecting export information (explained below), click [OK]. Different selection screens display for stocks, indices, cash series and options. All are described in detail in the full manual, which you can read through the Help Menu.

Export Directory and Format

At the right side of the file selection screen are the File Export Options. These apply to the files UA writes to your disk for analysis with third-party software. It is not necessary to write files to disk for analysis through UA or other programs designed specifically to read UA's compressed files. Most analytical software such as MetaStock®, VantagePoint and Omega's TradeStation require customization through these prompts.

First confirm that the desired portfolio is listed in the box at the top of the Portfolio Manager panel. Remember that each portfolio has a corresponding data directory where all files are stored together. If the correct portfolio is not shown, click the arrow beside the box and choose from the list of existing portfolios. All of your pre-selected Portfolio Settings, as arranged when the portfolio was created or edited, will apply to your new contract or stock.

Next you'll select the desired file format or formats for your data files.

- ASCII format produces text files that are useful for word processing and many spreadsheets.
- CSI refers to CSI's QuickTrieve® format, which is a binary

format that is popular with many analysis products.

- CSIM is a format that was originally designed to support MetaStock software. It is compatible with many older MetaStock-compatible programs, but not with the current MetaStock software.
- MS refers to the MetaStock format. It is created using a DLL provided to CSI by the makers of MetaStock, and should provide complete compatibility. (Data in this format should be used only with MetaStock software.)
- The Excel format is suitable for use in a Microsoft Excel spreadsheet.

Post Processing

Post processing refers to additional manipulations UA can perform upon the data while writing export files or displaying charts. These include detrending, inversion and applying custom studies.

Be sure to complete the left portion of your screen dealing with contract selection before clicking [OK] to finish the entry.

Once your portfolio is complete and any necessary files are built on your hard drive, you can select any portfolio item for charting and analysis through UA or by third-party software.

Portfolio Changes

UA only proceeds to the file selection screen during the initial setup of a new portfolio. After that, you can add files to the portfolio or change your current selections through the Portfolio Manager panel or through other entries on the Portfolio Menu.

***For more information on any Unfair Advantage feature,
please consult the full online manual,
which is listed as "Help Topics" on the Help Menu.***

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