## EdgeRater for HGSI Users



HGSI software and EdgeRater are independently powerful stock market analysis programs. When used together you have a combination that is more than the sum of its parts. An incredibly powerful duo of programs working together to show everything you need to arrive at your trading decisions.

This document explains how to set up HGSI and EdgeRater to work together and discusses some of the things that you can do with this combination of products.

## Using HGSI to generate Symbol Lists for EdgeRater



The Goal: Export any HGSI Group to use as a Symbol List in EdgeRater

Groups in HGSI can be used as Symbol Lists in EdgeRater, there are two ways to achieve this:

- 1. Export from within the HGSI Designer
- 2. Export from within the HGSI Warehouse

### Export from the HGSI Designer

Designer->File->ASCII Utilities->Export Groups As Lists

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Equis Metastock Utilities	Export Groups As ASCII Update ASCII Folders	Filter Help		
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Exporting a group from the HGSI Designer

- 1. In the HGSI Designer, choose the group you want to use as a symbol list in EdgeRater
- 2. Select 'File'
- 3. Select 'ASCII Utilities'
- 4. Select 'Export Groups As Lists...'

A new dialog box will pop up, the settings should be as follows:

Export Groups As Lists	4
Export groups to:	ОК
C:\Users\Chris <sup>\</sup> Documents\EdgeRater\Symbol Lists\S&P 1500.txt Browse	Cancel
□ Include all sub-groups	Help
Format: Symbol,Name	

Settings to use when exporting from the HGSI Designer

1. Browse to the EdgeRater Symbol Lists Folder:

#### {Documents}\EdgeRater\Symbol Lists

Location will be remembered next time you do an export

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Browse to the EdgeRater Symbol Lists Folder

- 2. Exclude HGSI Indexes from the export
- 3. Use the '*Symbol, Name*' format for export
- 4. Press OK

### Export from the HGSI Warehouse

The second way to export symbols from HGSI to use as a symbol list in EdgeRater is from an HGSI Warehouse View. Only the symbols in the view will be exported, so if the view defines a filter you will only get the symbols that pass the filter.

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Exporting Symbols from a Warehouse View

- 1. From the HGSI Warehouse, select 'File'
- 2. Select 'Save List As'



Browse to the EdgeRater Symbol Lists Folder

- 3. Locate the EdgeRater Symbol lists folder: {Documents}\EdgeRater\Symbol Lists
- 4. Type a meaningful name for your list
- 5. Press Save

Note that the file extension applied when you export a warehouse view as a list is **.lst**. It doesn't matter to EdgeRater whether the file extension is .lst or .txt (as exported by the designer). The contents of the exported files have the same format and EdgeRater will automatically make these lists available in the program.

Here's what the contents of the .lst file looks like:

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FOX,21St Centry Fox B Cm	
DDD,3D Systems Corp	
MMM, 3M Company	
EGHT,8X8 Inc	
AAON,Aaon Inc	
AIR,AAR Corp	
AAN,Aaron's Inc	
ABAX,Abaxis Inc	
ABT,Abbott Laboratories	
ABBV,Abbvie Inc. Common Stock	
ANF, Abercrombie & Fitch Company	
ABMD,Abiomed Inc	
ABM, ABM Industries Incorporated	
AKR,Acadia Realty Trust	
ACN, Accenture Plc	
ACET,Aceto Cp	
ACIW,Aci Worldwide Inc	
ACOR, Acorda Therapeutics	
ATVI Activision Rlizzand	

Contents of the exported list file

Notice that the format is *Symbol, Name*. This is the same format that we specified when exporting from the designer. The warehouse export uses this format automatically so we don't need to perform the extra step of specifying the format like we did in the designer. However, the Designer will remember the format that we specified for next time and so we won't actually need to specify it again there anyway.

#### Summary

EdgeRater can use any file contained in the {Documents}\EdgeRater\Symbol Lists folder as a symbol list providing it is in the correct format (*Symbol, Name*).

HGSI allows you to export groups of symbols from the Designer and Warehouse view to the EdgeRater symbol lists folder. Once you have performed that step the symbol list will automatically appear within the EdgeRater program.

# Getting End Of Day (EOD) Price History for a symbol list

Once you have exported a file in the correct format to the EdgeRater Symbol Lists folder, it should appear in the Symbol Lists dropdown control:



The EdgeRater Symbol Lists DropDown control

1. Press the Symbol Lists dropdown control to locate the exported list

If you have not used this particular list before, the 'Symbol Data' area will be blank:



Price history Data has not been downloaded yet

Press the EOD Update button to get historical price data for your new list

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V	DDD	3D Syste	5/2/2016	EOD	
V	MMM	3M Comp	5/2/2016	EOD	
V	EGHT	8X8 Inc	5/2/2016	EOD	
	AAON	Aaon Inc	5/2/2016	EOD	
V	AIR	AAR Corp	5/2/2016	EOD	
V	AAN	Aaron's Inc	5/2/2016	EOD	

EOD Update Button gets price history from provider

Once data has been updated, the main area of the symbol lists panel will be populated with the **symbol, name** and the **To** date representing the date of the last bar that was downloaded. If the **Time** field contains a time instead of saying EOD it means that you pressed the 'Intraday Update' button instead which fetched the last bar as a 15 min delayed bar from Yahoo.

## Default Data Provider

Each Symbol List in EdgeRater is associated with a data provider. If you haven't set a specific data provider for a symbol list, then when you press the 'EOD Update' button the data will be fetched from the system-wide 'Default Data Provider'. HGSI Users are recommended to set the Default Data Provider to HGSI.

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Setting the System-Wide Default data provider to HGSI

- 1. Go to the 'Home' menu tab
- 2. Press 'Data Providers'
- 3. Select HGSI (only available if you have HGSI Installed)
- 4. Press OK

## Symbol List Data Provider Overrides

Each list can override the default data provider and get data from a specific provider such as Yahoo. If you don't set a specific override the data will come from the default provider. To see where the data is actually coming from , default or override, you can press the 'Edit List' button.

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Overriding the default data provider for a symbol list

- 1. Press 'Edit List' button
- 2. In the 'Symbol List' tab, choose the desired data provider for the symbol list

## Archive View

One of the most powerful and time-saving features of the integration between HGSI and EdgeRater is the 'Generate Indexes from Warehouse' template which requires a warehouse archive view (containing all warehouse fields) and a 'No Filter' filter applied. You can import this view into your HGSI software.

The file to import can be found by going to

http://www.edgerater.com/sharedfolder

and searching for the Integrations->HGSI Folder.

There you will find a filter to import (.flt) and a warehouse view to import (.whs).

Download both of these files to your desktop and then use the HGSI program import functionality to import the Filter and Warehouse view.

### Importing the Filter:



Importing the EdgeRater Filters into HGSI

- 1. Press the Filter button
- 2. Select the root Filters folder
- 3. Press the Import button
- 4. Locate the downloaded .flt file
- 5. Press Open

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Importing the EdgeRater Warehouse Views into HGSI

- 1. In the Warehouse, select 'Choose/Create View' button
- 2. Select the root Warehouse Views Folder
- 3. Press 'Import'
- 4. Locate the downloaded .whs file
- 5. Press 'Open'

### Using the Archive View

The EdgeRater Archive View that was imported into HGSI in the previous section is used for archiving the current state of the warehouse. Use this view on the 'All Securities' group. This information can be used by EdgeRater for many different analysis tasks:

- EdgeRater can automatically generate and fetch price history for an 'All Securities' symbol list.
  - EdgeRater can automatically generate 10 year indexes for the following groups:
    - Industry Group
    - Major Industry Group
    - Sector Group
    - SIC Code Group

Once you have these 10 year indexes you can run them against EdgeRater templates. One example is to find out the seasonality of the various industry groups (by running the Annual Trends templates)

• The EdgeRater warehouse report can report on which ERG values have performed best/worst since the report was saved, as well as which A/D letter rank and HGS Box performed best and worst.

In order for EdgeRater to use this Archive view it needs to be saved from HGSI to your file system as an HTML file.



#### Saving the warehouse as an HTML File

Choosing the Warehouse Archive View and All Securities group

- 1. In the HGSI Warehouse make sure you have the 'All Securities' group selected.
- 2. Press the 'Quick Pick' Views button
- 3. Choose the Archive View from the EdgeRater Views

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			TFSC	N		1347 Capital Cp	o War			18514.53	-28.000002	04/27	16 0.16	<u>;                                    </u>
		15	PIH			1347 Property I	ns Cm			33774.50	-6.723643	05/02/	16 5.90	)
		16	STPZ			1-5 Year US Ti	ps Index ETI	F Pimco		33221.45	0.335159	05/02	16 52.2	29
		17	LTPZ			15+Year US T	ips Index ET	F Pimco		14010.72	1.613747	05/02	16 66.0	12
		18	FLWS			1-800-Flowers.0	Com			11001.86	-4.753880	05/02/	16 7.67	·
		19	FCTY			1St Century Ba	ncshs			25168.73	21.058628	05/02/	16 10.9	9
		20	FCCY			1St Constitution	п Вор			19539.09	4.014150	05/02/	16 12.5	i0
		21	SRCE			1St Source Cor	р			33603.69	6.137762	05/02	16 34.7	4
		22	MLPS			1X Short Aleria	n MLP Infr E	TN UBS E-T		25836.48	0.194470	05/02/	16 13.3	8
		23	TYBS			20+Year Trsy B	Bear 1X Dire	xion		23836.87	-3.573419	05/02/	16 20.8	15
		24	TMV			20+Year Trsy B	Bear 3≺Dire	xion		38497.79	-8.396300	05/02/	16 22.0	12
		25	TMF			20+Year Trsy B	Bull 3X Direx	ion		16147.01	5.240243	05/02	16 89.3	6
		26	BSCG			2016 Corp Bon	d Bulletshare	es Guggenhei		26782.87	-0.080845	05/02	16 22.0	16
		27	BSJG			2016 HY C Bd	ETF Bulletsł	ares Guggenh		20679.10	-0.361955	05/02	16 25.7	7
		28	IBME			2016 S&P Amt-	Free Municip	al Ser Ishar		16557.91	-0.248700	05/02/	16 26.3	8
		29	BSCH			2017 Corp Bon	d Bulletshare	es Guggenhei		20837.74	-0.034264	05/02/	16 22.6	9
		30	BSJH			2017 HY C Bd	ETF Bulletsł	ares Guggenh		23752.22	0.243495	05/02	16 25.7	0
		31	IBMF			2017 S&P Amt-	Free Municip	al Ser Ishar		18273.99	-0.101652	05/02	16 27.3	7 4
						<								> .::

Saving the Warehouse Archive View as an HTML File

- 4. Press 'File'
- 5. Press 'Save As HTML...'



Saving the Warehouse Archive View (Choosing the folder to save to)

- 6. Create a folder structure to store this html file
  - a. Create a folder named 'HGSI' underneath {Documents}\EdgeRater
  - b. Create a folder named 'Warehouse Archive' under the new 'HGSI' Folder
- 7. Choose a filename for the html file (All Securities.htm is good)
- 8. Press Save

### Using this data in EdgeRater

Once you have saved the warehouse HTML file from HGSI you can close HGSI. EdgeRater can do all kinds of cool things with this data providing you have your EdgeRater Default Data Provider set to HGSI. The most important template to run to make use of this data is the 'Generate Indexes From Warehouse' template.



#### Generate Indexes From Warehouse

Using the 'Generate Indexes From Warehouse' Template

- 1. In EdgeRater, locate the HGSI Category of Templates
- 2. Find and select the 'Generate Indexes From Warehouse' template
- 3. Press 'Change Settings' and locate and open the warehouse html file just saved (note that on future runs the settings will be remembered and so you won't need to press 'Change Settings' next time. Just ensure that the Warehouse File field is pointing at the right file.



Choosing the warehouse html file saved from HGSI

- 4. Press Browse
- 5. Locate the Warehouse Archive Folder created in the previous steps
- 6. Locate the All Securites.htm file saved from the previous steps
- 7. Press 'Open'

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Running the 'Generate Indexes From Warehouse HTML' Template

- 8. Ensure that the warehouse html file is selected (remembered from previous runs)
- 9. Press 'Run'

Running this template will instruct EdgeRater to perform the following tasks:

a. Convert the HTML file to a useable .xlsx spreadsheet file, named for the date of the data contained within, eg:

#### 20160502 Warehouse All Securities.xlsx

Note that if you export a warehouse html file and run this template every day you will create a new archive xlsx file daily that will contain the contents of the warehouse on that day. Great for keeping a record of all the rich information you have in HGSI. These files are all openable and searchable within Microsoft Excel, but you don't need Excel in order to run EdgeRater.

- b. Automatically create the following Symbol List
  - Warehouse All Securities
- c. Automatically create 10 year indexes of the following groups
  - Warehouse Indexes SIC
  - Warehouse Indexes Major Industry
  - Warehouse Indexes Industry
  - Warehouse Indexes Sector

These symbol lists and indexes now appear in the EdgeRater Symbol Lists Panel and can be used on any template that requires a symbol list. For example, run the Seasonality Template on the 'Warehouse Indexes Industry' list.

When the template has finished running you will see the following information:

A	C:\Users\Chris\Documents\EdgeRater\Reports\HGSI_Warehouse_Indexes -2016-05-03_06-34-07-PM.xlsx –														×
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Ver	sion	Repo	rt			Watch Lists		T	ools		Сору С	olumns			
A6		✓ Index	genera	ation has cor	mpleted and	you should now	find the index	kes in the symb	ol lists area. N	Note that	these symbol list	should not be u	updated using th	e norm	al EOD
	Α	В		C D	E	F	G	н	I	J	K	L	м	N	· ^
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4	Edg	eXcel™Te	emp	late Te	chnolo	gy		http://w	ww.edger	ater.cor	<u>n/</u>				
5															
	Index generation has completed and you should now find the indexes in the symbol lists area. Note that these symbol lists should not be updated using the normal EOD or Intraday update button. They must be re-generated daily by running this template again.														
6		Marahau	eo Tilo		CALIFORM		nonte\ Edg	a Datar \ UCC	Warahau	co Arob		ling htm			
8	Wareh	ouse Symbo	se riie sl List	Name:	Wareho	use All Securi	ties txt	ekater (HGS	I\warenou	se Arch	ive (All Securi	ues.nun			_
9	Waren			i i unici	Wareho		cico.cxc								
10		Gene	erated	l Index	Index Sy	mbol List Na	me								
11		Industry Gr	oup Ir	ndexes:	Wareho	use Indexes l	ndustry.txt								
12		Sec	ctor Ir	ndexes:	Wareho	use Indexes S	ector.txt								
13		Major Indu	stry ir	ndexes:	Wareho	use Indexes N	/lajor Indu	stry.txt							- 1
14		SIC Gr	oup Ir	ndexes:	Wareho	use Indexes S	IC.txt		1						- 1
15			_												

Information displayed after a successful 'run' of the 'Generate Indexes From Warehouse HTML' template If you open up the Symbol Lists panel dropdown you will see these new lists:



Symbol Lists and data automatically generated by the template

## Summary

HGSI Software Users can export an All Securities warehouse archive view as an HTML file and then use EdgeRater to automatically generate indexes and symbol lists for use within the EdgeRater software program. This is achieved using the 'Generate indexes from warehouse HTML' template. Doing this daily also ensures that you have a searchable history of warehouse fields. The indexes and symbol lists produced can be run against any EdgeRater template to give insightful information such as the Seasonality of the various Industry Group indexes or report of Industry Group Rotation.

EdgeRater can also use the archived files to show the performance of ERG stocks, A/D letter rank stocks and HGS Box stocks over any period of time (via the Warehouse report template).