

Building Portfolios in Techsignal™

Building portfolios in Techsignal™ and populating them with securities are fairly easy once a data source is set up and data downloaded. To set up a data source and download data, read the article entitled [Setting Up a Data Source for Use in Techsignal™](#).

You can use symbols for stocks, commodities, funds, currencies and bonds, either end-of-day or intraday, whatever your data source allows. This article assumes you have a data source and have already downloaded your data.

You begin by building a new portfolio in Techsignal™ using the data files from your data source. You create a name for your Techsignal™ portfolio and then select a folder and location (path) to store your portfolio.

[This article covers two basic Building Portfolio methods, one for Metastock data files (page 1) and one for ASCII data files (page 3). This article does not discuss setting up a data source, nor making the format of your data compatible with Techsignal™. Techsignal™ supports several of the more common formats “right out of the box.” If you are having problems, contact Tech support at 505-891-8016.]

Building Portfolios (THE STEPS for METASTOCK)

1. Open the Techsignal™ program using the desktop icon. The first screen is “Main Menu Data Input.” Click on the button on the right, “**Build and Edit Portfolios.**”
2. You see a new screen entitled “**Build Portfolio.**” On the left side of the screen, select your “**Data Type**”--ASCII, CSI or Metastock. That choice must match the format of your data source. If your data source is Yahoo, the default format is Metastock; Quote.com uses ASCII. If there is a choice, download your data in Metastock format since this format offers more conveniences and is faster to work with in Techsignal™. There are other data vendors, but most use one of these three basic data types.
3. Click on the button “**Begin New Portfolio**” and a new button pops up on the left called “Name New Portfolio.”
4. Click on “**Name New Portfolio,**” and a Windows dialog box pops up called “Choose Folder and Name for Portfolio.” In Windows-based systems, you see in the center of the dialog box a list of folders on your main drive.
5. In the small box “**File name**” at the bottom of this screen, type in a new name for your Techsignal™ Portfolio (any descriptive name like DJ30 or ETF Funds). That name becomes the Techsignal™ Portfolio name you see in the Main Menu

every time you boot into Techsignal™. The "Files of type" box below File name says Text Files (*.txt), and (*.txt) is your Techsignal™ Portfolio file format for housing your listing of symbols Techsignal™ uses for Portfolio names. Leave that box alone.

6. Next, **scroll through the list of folders** above to find the pre-existing folder where you want the new Techsignal™ Portfolio you are creating to be stored. Your choice can be any folder, and not necessarily a folder in the C:\Program Files\FSCCTS directory where your Techsignal™ program files are located though many people store their Techsignal™ Portfolios right in the C:\Program Files\FSCCTS\Cyc folder. The folder name where the Techsignal™ Portfolio will be stored should now be showing in the "Look in" box near the top of the "Choose Folder & Name for Portfolio" window.

If the folder in which you want to store your portfolio hasn't been created, you must stop, and go back into Windows to the location you want the folder, and create the folder, and then come back to this point in this Building Portfolios discussion.

7. **Click the Open button** and you are taken back to the "Build Portfolio" screen, and you see the path and Portfolio name you just created with .txt after the Portfolio name in the "Portfolios available" window on the right, along with any other Portfolios previously saved. Highlight that Portfolio name by **"double clicking on it"** and you see a large open blank window just below.

8. Click on the **"Get Files for New Portfolio"** button, and you are taken to a new Windows dialog box titled "Open." You will see either "qmaster" or "master" showing in the "File Name" box. Do not change that word since it is there by default from your choice of data type.

9. Scroll through the folders in the Windows box to locate the folder containing the data files from your data source which you want Techsignal™ to use. You must know where the folder is which contains the data downloaded from your data source. If you have more than one data vendor, you would likely have more than one data folder.

For example, if your data source were HQuote Pro, you might have created an HQuote Pro Portfolio for your raw data called for example Main Portfolio EOD located at C:\Program Files\HQuote\Main Portfolio EOD. Double click on the folder containing your desired data files, and you will pull up the screen showing your Metastock data files in the Windows box (assuming Metastock is the Data Type you selected).

Above in the "Look in" box you see the folder name, and in that folder are the file names of your downloaded Metastock data, names looking like "F1.dat, F2.dat,

etc.,” as well as three other Techsignal™ files called “emaster, master, and master.mqd.”

10. **Click on the Open button** and you are taken back to the “Build Portfolio” window. There is now a new button on this screen called “Get Whole Master” or “Get Whole QMaster” depending on which type of data (Metastock, ASCII, or CSI) you selected earlier; only one choice shows up based on your data file type.

11. In the “Programs Available” window, double click on the new Portfolio name you created (path and filename.txt showing) and an empty white box shows up in the window below. Click on **Get Whole Master or Get Whole QMaster** button and immediately you see all the data symbols from your data source in this white box area. You could have selected just one or several files for your portfolio; usually most people click on the Get Whole ...Master button to get all the symbols.

12. You have now placed into your new Techsignal™ Portfolio the data files that were previously downloaded from your data source. So, click on the **“Save Files and Continue”** button. You are taken back to the “Main Menu Data Input” screen where you now see the Techsignal™ Portfolio you just created. **Double clicking** on that Portfolio name will populate the screen with all the of the data files you put into your Techsignal™ Portfolio.

Make sure Data Type on the left is still correctly selected. Check the box “Choose” for the data file you want to analyze and hit the “Begin New Analysis” button to start your Techsignal™ analysis.

13. If **you don’t want to save any of the work you just did**, creating a portfolio of symbols in Techsignal™, in the previous step 11 you could have hit the “Quit” button instead of “Save Files and Continue.” If you had hit “Quit,” Techsignal™ would still have kept the Portfolio name you created, only that there would be no data saved in the Techsignal™ Portfolio. If you don’t want to save even the Techsignal™ Portfolio name you created, you can erase it through “Editing Portfolios” (see page 5, Working with Portfolios).

14. Once you have created a Techsignal™ Portfolio, with or without symbols, you can use Edit, and either add, delete or restore symbols, and you can delete and restore the entire Portfolio, symbols and all.

Building Portfolios (THE STEPS for ASCII)

1. Open the Techsignal™ program using the desktop icon. The first screen is “Main Menu Data Input.” Click on the button on the right, **“Build and Edit Portfolios.”**

2. You see a new screen entitled “**Build Portfolio.**” On the left side of the screen, select your “**Data Type**”--ASCII, CSI or Metastock (you are selecting ASCII here). That choice must match the format of your data source. If your data source is Yahoo, the default format is Metastock; Quote.com uses ASCII, and there are many other data vendors, most using one of these three basic data types. Selecting ASCII causes a Windows tree to open up in the upper left corner.

Remember, if there is a choice, download your data in Metastock format since this format offers more conveniences and is faster to work with in Techsignal™.

3. Click on the button “**Begin New Portfolio**” and a new button pops up on the left called “Name New Portfolio.”

4. Click on “**Name New Portfolio,**” and a Windows dialog box pops up called “Choose Folder and Name for Portfolio.” In Windows-based systems, you see in the center of the dialog box a list of folders on your main drive.

5. In the small box “**File name**” at the bottom of this screen, type in a new name for your Techsignal™ Portfolio (any descriptive name like DJ30 or ETF Funds). That name becomes the Techsignal™ Portfolio name you see in the Main Menu every time you boot into Techsignal™. The “Files of type” box below File name says Text Files (*.txt), and (*.txt) is your Techsignal™ Portfolio file format for housing your listing of symbols Techsignal™ uses for Portfolio names. Leave that box alone.

6. Next, **scroll through the list of folders** above to find the pre-existing folder where you want the new Techsignal™ Portfolio you are creating to be stored. Your choice can be any folder, and not necessarily a folder in the C:\Program Files\FSCCTS directory where your Techsignal™ program files are located though many people store their Techsignal™ Portfolios right in the C:\Program Files\FSCCTS\Cyc folder. The folder name where the Techsignal™ Portfolio will be stored should now be showing in the “Look in” box near the top of the “Choose Folder & Name for Portfolio” window.

If the folder in which you want to store your portfolio hasn’t been created, you must stop, and go back into Windows to the location you want the folder, and create the folder, and then come back to this point in this Building Portfolios discussion.

7. **Click the Open button** and you are taken back to the “Build Portfolio” screen, and you see the path and Portfolio name you just created with .txt after the Portfolio name in the “Portfolios available” window on the right, along with any other Portfolios previously saved. Highlight that Portfolio name by “**double clicking on it**” and you see a large open blank window just below.

8. At this step you deviate from the Metastock Building Portfolio procedure above. Instead of clicking on the “Get Files for New Portfolio” button, you **scroll through the Windows folder tree in the upper left corner** to locate the folder containing the data files from your data source which you want Techsignal™ to use. You must know where the folder is which contains the data downloaded from your data source. If you have more than one data vendor, you would likely have more than one data folder.

9. **Check the empty box** which appears in front of the data file you have located, and a dialog box pops up asking you to enter a “Description” (name) for the title of the Graph which will be showing in Techsignal™ when you perform an analysis. **Type in a name.**

[Discussion: ASCII files require you to enter a Graph title for each file you put into a Techsignal™ portfolio, unlike Metastock which only requires you to name a portfolio and then drop the all the data files you want into the portfolio without having to individually name each file; the file in Metastock takes the name used in the data source folder. That extra naming step with ASCII files is one reason Metastock file formats are preferred. The other reason is that ASCII files come in many flavors and varieties, and often require extra formatting work so that Techsignal™ can read these files]

10. **Hit OK** and you see the Graph title in front of the data file path and name in the large open window just below the “Portfolios available” window. You can add as many ASCII files as you want by repeating steps 8 &9, typing a new name for each file added and clicking OK.

11. You have now placed into your new Techsignal™ Portfolio the data files that were previously downloaded from your data source. So, click on the **“Save Files and Continue”** button. You are taken back to the “Main Menu Data Input” screen where you now see the Techsignal™ Portfolio you just created. **Double clicking** on that Portfolio name will populate the screen with all the of the ASCII data file names you just put into your Techsignal™ Portfolio.

12. Make sure ASCII Data Type on the left is still correctly selected. Check the box “Choose” for the data file you want to analyze and hit the “Begin New Analysis” button to start your Techsignal™ analysis.

13. If **you don’t want to save any of the work you just did**, creating a portfolio of symbols in Techsignal™, in the previous step 12 you could have hit the “Quit” button instead of “Save Files and Continue.” If you had hit “Quit,” Techsignal™ would still have kept the Portfolio name you created, only that there would be no data files saved in the Techsignal™ Portfolio. If you don’t want to save even the Techsignal™ Portfolio name you created, you can erase it through “Editing Portfolios” (below).

14. Once you have created a Techsignal™ Portfolio, with or without symbols, you can use Edit, and either add, delete or restore symbols, and you can delete and restore the entire Portfolio, symbols and all (below).

Working With Portfolios

Techsignal™ lets you edit a Portfolio to **add, delete or restore symbols** within a Portfolio, and to **delete and restore Techsignal™ portfolios** themselves. When you delete a Portfolio from Techsignal™, you only delete the Portfolio and its contents from the Techsignal™ display, while the Portfolio file and its contents are still in the Techsignal™ directory and the data files themselves still remain on your computer in the folder stored in your data source directory.

To delete the data files permanently from your computer, you must go to the data source folder in Windows, outside of Techsignal™. **A deleted data file** from a Techsignal™ Portfolio can be quickly added back into the Portfolio just like adding any new symbol, and even a Portfolio deleted from Techsignal™ can be quickly restored with all the files added back into the Portfolio, with a few additional steps.

Editing Portfolios (THE STEPS)

1. Open Techsignal to the first screen “Main Menu Input.” Click on the **“Build and Edit Portfolios”** button on the right and you see a new screen “Build Portfolios.”
2. On the right, under the “Portfolios Available” bar is a listing of your Portfolios. **Double click a Portfolio name** and a listing of all the files in that Portfolio will appear in a new white window area just below the list of Portfolio names.
3. Click on the new button **“Edit a Portfolio.”** On the left appear three new buttons: Delete a Portfolio, Delete a File in a Portfolio, and Add to an Existing Portfolio.
4. **To Add or Restore Files**, begin from the starting “Main Menu Data Input” window, click on the “Build and Edit Portfolios” button—double click the Portfolio name in the “Portfolios Available” window you want to add or restore symbols to—**select your “Data Type”** on the right (ASCII, CSI or Metastock—to match the format used by your data source)—hit the “Edit a Portfolio” button—click on **“Add to an existing Portfolio”** button—click on **“Get Files for Portfolio”** button above—a Windows box opens up called “Open”—scroll to the data source folder and double click on the folder housing your data (e.g. scroll to C:\Program Files\Quote by doubling clicking on drive C, then on Program Files, then on Quote).

Next, **double click on the folder name holding your data**—you will then see that folder name in the “Look in” box at the top along with a listing of the data files below in the white boxed area; for Metastock, the files names will look like F1.DAT, F2.DAT, etc. (**remember**, even if files were deleted from the Techsignal™ program display, the data files themselves are still present in the data source folder)—hit the “Open” button—hit the “Get Whole Master” button (you now see the data files with recognizable symbols drop into the center window)—hit the “Save Files and Continue” button. Techsignal™ has now added or restored data files to the Portfolio you designated. Done.

5. To Delete Files. Note: files deleted from the Techsignal™ display are also permanently removed from the Techsignal™ Portfolio folder but the files still sit in the data source folder. The files can be quickly and easily recovered if needed.

Begin from the starting “Main Menu Data Input” window, click on the “Build and Edit Portfolios” button. **Double click** on the Portfolio name in the “Portfolios Available” window and you see the Portfolio files displayed in the white window area below. Click on the “Edit a Portfolio” button on the bottom of the window. You see three new buttons “Delete a Portfolio,” “Delete a file in a Portfolio,” and “Add to an existing Portfolio.” Highlight the file you wish to delete. Click on the “Delete a File in a Portfolio” button and the file disappears from the Techsignal™ display while the Portfolio remains.

You can next delete the Portfolio name itself, from right here, by first highlighting the Portfolio name to be deleted (one click) and then hitting the “Delete a Portfolio” button. BE CAREFUL here that you do not move too fast and accidentally delete the wrong portfolio. However, even if you deleted an item by mistake, you can quickly restore the item (page 8). End by hitting the “Quit” or “Save and Continue” button. Done.

The files have been deleted from the Techsignal™ Portfolio display and from the Portfolio text file in the Techsignal™ directory, but as said, not from the data source folder. The data files still sit in the folder of your data source, in the event that you might want to restore that file (for those using HQuote Pro, the data files sit in the C:\Program Files\HQuote\original Portfolio name folder.

6. To Delete a Portfolio. Note: a deleted Portfolio from Techsignal™ is only deleted from the Techsignal™ display of Portfolios. The Portfolio folder and symbols are still in the Techsignal™ directory and the symbol data are still in the data source folder.

Begin from the starting “Main Menu Data Input” window, click on the “Build and Edit Portfolios” button— select “Data Type” –hit the “Begin New Portfolio” button— double click on the Portfolio name in the “Portfolios Available” window

and you see the Portfolio files displayed in the white window area below--click on the "Edit a Portfolio" button on the bottom of the window—next click on the "Delete a Portfolio" button—you now see that your Portfolio name is gone from the "Portfolios Available" window, though you still see the files of that portfolio window still displayed in the center white box area (they will be gone when you leave this screen)—hit the "Save Files and Continue" button—you are taken back to the starting window "Main Menu Data Input." Your deleted Portfolio is no longer showing in the upper area displaying other Portfolios. Done.

7. Verify that the Techsignal™ Portfolio Name and Data are still in the Techsignal™ Directory after Deleting a Portfolio

You can verify that 1) the Portfolio you just deleted from the Techsignal™ "Portfolios Available" display is still in the Techsignal™ \FSCTS folder along with the symbols you had in the Portfolio (remember you only deleted the Portfolio name from the Techsignal™ display of Portfolios); and 2) that the original data files are still in the original data source folder, and in this example, in the downloader HQuote Pro directory, in the \HQuote \original Portfolio name folder.

In Windows, go to My Computer—C:\Program Files, and from here, there are two directions: 1) to verify the original Portfolio file, go to the Techsignal™ Portfolio folder \FSCTS\Cyc where you see the just deleted Portfolio file name, and double clicking on this Portfolio text file opens it up in Notepad where you will see the recognizable original symbols; or 2) to verify the original data files, go to My computer—C:\Program Files\HQuote\original Portfolio name folder, and you will see the data files (in Metastock format) looking like F1.DAT, F2.DAT, etc. along with the three Techsignal™ master files.

8. To Restore a Deleted Portfolio and its Symbols. The data files still sit in your data source folder (where they were downloaded), and even the deleted Techsignal™ Portfolio and the symbols it contains all still sit in your Techsignal™ directory (typically, in Windows, at C:\Program Files\FSCTS\CYC). The deleted Portfolio is simply not being displayed in Techsignal™. Let's say for this discussion that your deleted Portfolio to restore is named ExchangeFunds and that it contains symbols. Again, this discussion assumes data in Metastock format.

From the "Main Menu Data Input" window--click on the "Build and Edit Portfolios" button— select the "Data Type"—hit the "Begin New Portfolio" button—hit the "Name New Portfolio" button, and you are taken to the "Choose Folder and Name for Portfolio" window—scroll to the Techsignal™ \FSCTS directory and to the folder housing the original deleted Techsignal™ Portfolio text file (in Windows, typically this is C:\Program Files\FSCTS\CYC).

Click on the name of the deleted Portfolio (a .txt text file), here it's named ExchangeFunds, and you see that Portfolio file name in the "File name" box—hit

the “Open” button and you are taken to the “Build Portfolio” screen—hit the “Get Files for Portfolio” button—scroll to the original data source folder where the deleted Portfolio with all the symbols still exist (in Windows and using HQuote Pro as downloader for Yahoo data source, typically this is C:\Program Files\HQuote)

Double click on the folder name holding the data files, and you then see the name, Exchange Funds, in the “Look in” window at the top, and you see the data files F1.DAT, etc. and 3 master files below (remember our example here is using Metastock format data)—hit the “Open” button on the lower right—you are taken back to the “Build Portfolio” window where you see the recognizable list of symbol names in the window in the upper left corner.

Highlight the Portfolio name ExchangeFunds showing in the “Portfolios Available” window—hit the “Get Whole Master” button—hit the “Save Files and Continue” button—you are taken back to the starting screen “Main Menu Data Input” where you see the ExchangeFunds Portfolio name in the center window—double click on that ExchangeFunds Portfolio name and you once again see the recognizable symbols in that Portfolio. Everything is now restored. Done.