# Instructions for AbleTrend Portfolio Performance
(10/18/2019)

A portfolio in trading means a combination of many stocks, futures, forex, bonds etc. AbleTrend Portfolio Performance (APP) uses a workspace as a portfolio, and auto setup the 100% mechanical trading parameters for each symbol with one click.

1. **Setup a Portfolio Workspace**
   A quick way to setup a portfolio: Simply open pre-built workspace named Portfolio1. Go to File > Open Workspace > Select Portfolio1…
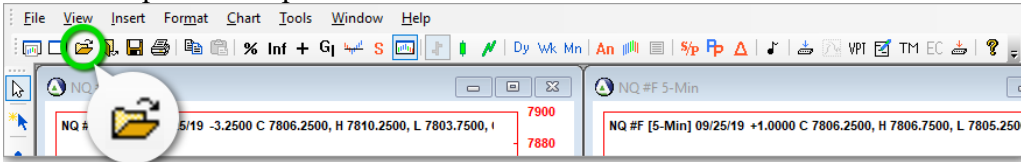

2. **Change symbols for the portfolio**
   Click any chart, then type (press keys) the symbol, the input window will popup, you input the symbol, such as WMT…then press "1 Chart".

   To add additional symbols, simply use Copy & Paste button to copy and paste charts, then change the symbols.
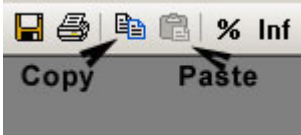
3. **Change time intervals for all charts**
   To change intervals for all charts, directly press D- for daily, or W- for weekly or M- for monthly, then click "All Charts". We suggest using longer time intervals for position trading.
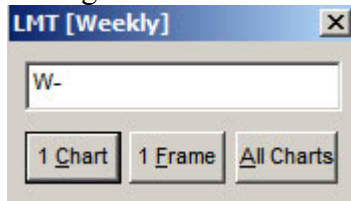
   *The longer time interval, the higher accuracy. Please try weekly and monthly charts*

4. **Add trading a trading strategy system to a chart**
   The pre-built workspace already has AbleTrend TS trading strategy system added to each chart. Portfolio Performance uses the AbleTrend TS signal results to

5. **Run Auto Setup for the optimized parameters**
   Simply Click the "PP" icon to show APP display window.
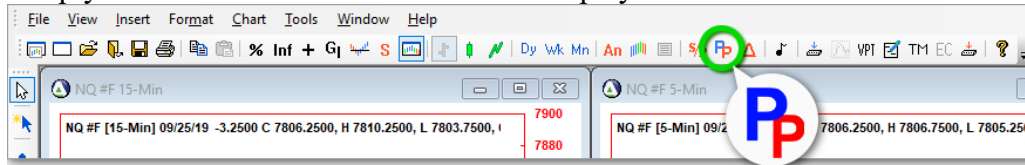
6. **View Equity Line Chart of the portfolio**
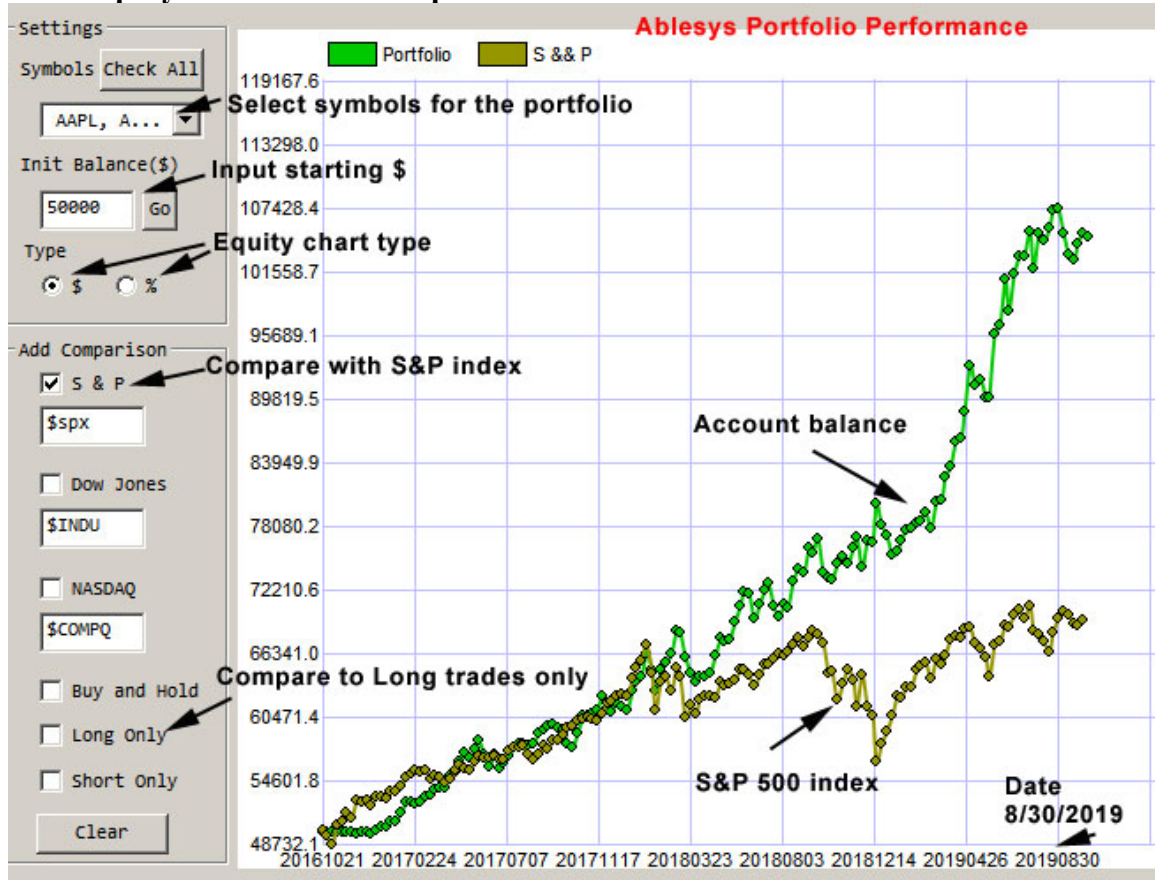
Here:

Symbols – You may select which symbol included in the portfolio, and see performance of each symbol when you only check one symbol …

Init Balance ($) – Setup starting account balance in $ amount

Type – Equity Line (EL) type in $ or % percentage

Add Comparison – You may compare with S&P 500 Index, Dow Jones Index, Nasdaq Index, Buy & Hold, Long trades only, Short trades only.

Clear Button – Clear all added curves by one click, only show portfolio EL alone

Point mouse to the EL curve – Show the details of Date, specific P/L numbers

7. **View Back Testing Report of the Portfolio**
   On the right side you may see back testing report for the portfolio. If you make any change for charts, the equity line chart and back testing report will change accordingly. See an example below.

```
Porforlio Report  Report
                    ┌──────────────────────────────────┐
                    │ Symbols Information            ▲  │
                    │ Symbol Shares TSPC DEV. M.Rk  EE  │
 Symbols,           │ --------------------------------- │
  # shares          │ AAPL    26.6   9  0.0    2   Ye   │
                    │ ADBE    28.9   1  0.0    2   Ye   │
  and TS            │ AMZN     3.8   3  0.0    2   Ye   │
 settings  ──────▶  │ CMG      7.8  13  0.0    2   Ye   │
                    │ COST    20.8   8  0.0    2   Ye   │
                    │ DIA     17.2  12  0.0    2   Ye   │
                    │ FB      24.4   4  0.0    2   Ye   │
                    │ GLD     26.1   3  0.0    2   Ye   │
                    │ HD      24.8   1  0.0    2   Ye   │
                    │ LMT     13.4   5  0.0    2   Ye   │
                    │ MSFT    54.5   5  0.0    2   Ye   │
                    │ SBUX    59.0   3  0.0    2   Ye   │
                    │ SHOP    74.0  19  0.0    2   Ye   │
                    │ SPY     14.7  13  0.0    2   Ye   │
                    │ VEEV    82.8   1  0.0    2   Ye   │
                    │ XLK     66.0   6  0.0    2   Ye   │
 Trading            │                                   │
 Long & Short       │ Portfolio report                  │
                    │ --------------------------------- │
                    │ Total Net Profit      54786.30    │
                    │ Total % Net Gain        109.57%   │
                    │ Avg Annual Percent       27.97%   │
                    │ Max Draw Down          4832.32    │
                    │ Avg Draw Down          2469.99    │
 Trading Long       │ Long only report                  │
 only               │ --------------------------------- │
                    │ Total Net Profit      56290.78    │
                    │ Total % Net Gain        112.58%   │
                    │ Avg Annual Percent       28.58%   │
                    │ Max Draw Down          7301.20  ▼ │
                    └──────────────────────────────────┘
```
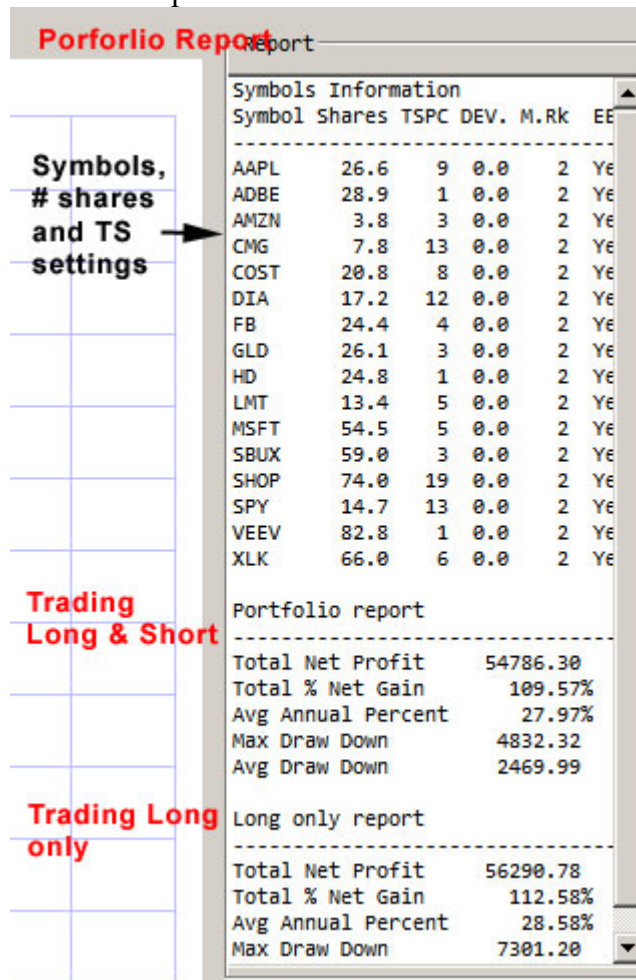
Here:
Shares - # of shares for each symbol
TSPC – TSPC of the AbleTrendTS
DEV. – Deviation of the AbleTrendTS
M.Rk – MoneyRisk of the AbleTrendTS
EBC – Entry at Bar Close of the AbleTrendTS, Yes or No setting

8. **Export:**
Both equity line chart and back testing report can be exported to a text file, and the data can be used by Microsoft's Excel software to give a better presentation.