



QSTMARKETS Terminal user manual

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Section 1 - Introduction

1. What is QSTMarkets?

QSTMarkets is an professional financial terminal that brings institutional-grade market analysis tools to retail investors and students. Inspired by the layout and philosophy of the principal Financial Terminals available in the market, QSTMarkets provides a unified workspace where users can monitor real-time prices, study company fundamentals, read curated financial news, and track macroeconomic indicators - all from a single, keyboard-driven interface.

The terminal runs entirely in the browser. Its workspace is built on a panel system that the user can arrange freely by dragging and resizing each panel. Every panel is activated by typing a command into the Command Bar at the top of the screen.

Core design principles:

- **Command-first navigation.** Every feature has a short command mnemonic (e.g., GP for a price chart, DES for a company description, FA for financial statements). Users familiar with professional terminals will feel at home immediately; newcomers will find the HELP command a useful starting point.
- **Open data, no subscriptions.** QSTMarkets aggregates data from free and freemium public APIs (yFinance, SEC EDGAR, FRED, Alpaca, Finnhub, Tiingo, and others).
- **Panel workspace.** Each command opens a panel. Multiple panels can be open simultaneously and arranged side by side. Panels are persistent across page reloads; the layout is saved automatically per user account.
- **Real-time and historical.** Price data updates in real time during market hours via WebSocket. Historical charts cover up to ten years of daily OHLCV data plus intraday intervals from 1-minute to 1-hour.

Supported asset classes:

Asset class	Examples	Coverage
US equities	AAPL, MSFT, JPM	Full (price, fundamentals, news, screener)
Crypto (spot)	BTCUSD, ETHUSD	Price chart, description, news

Precious metals	XAUUSD, XAGUSD	Price chart, description, metals news
Energy commodities	WTIUSD, BRENTUSD, NGUSD	Price chart, description, energy news

Navigation basics:

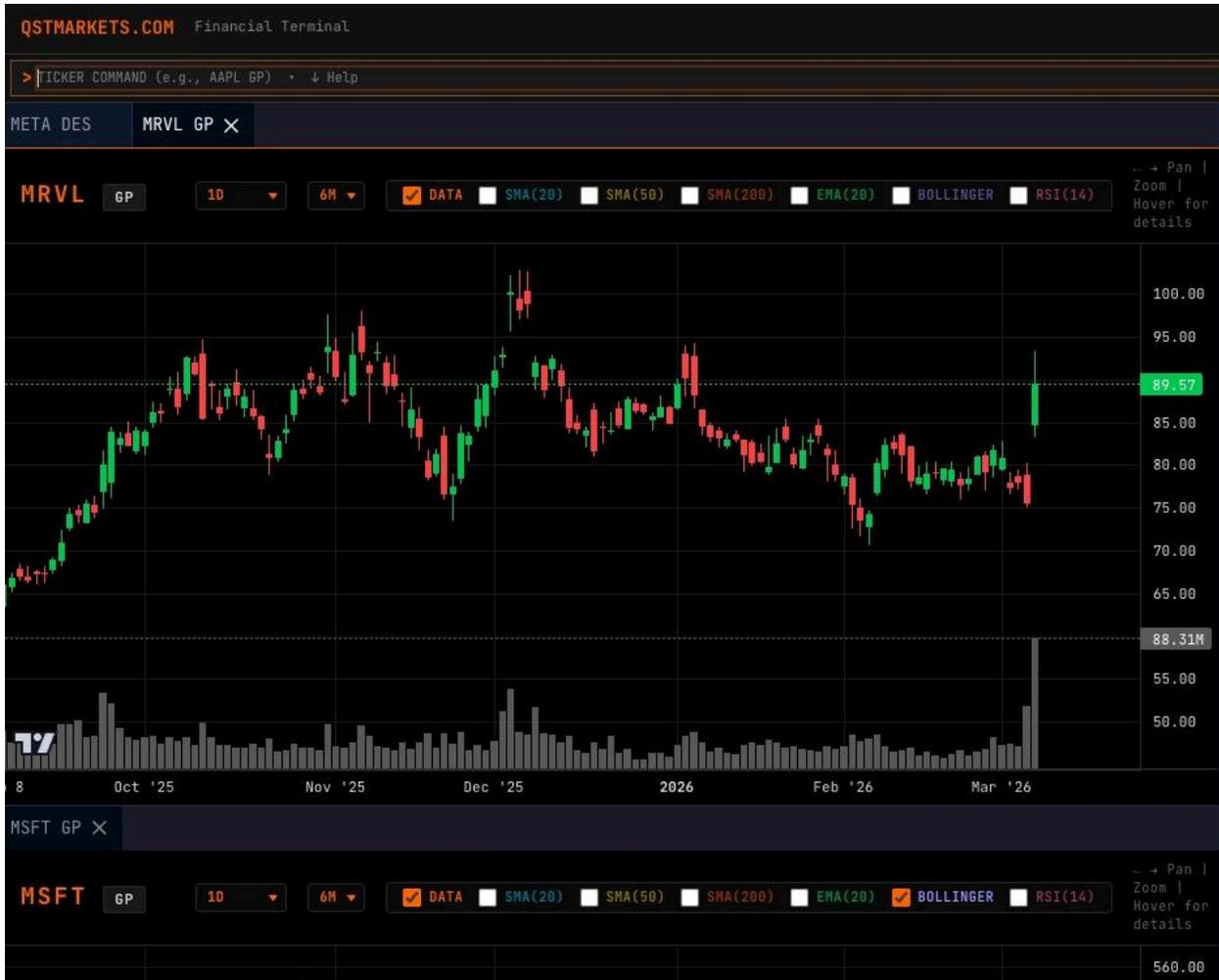
1. Click the **Command Bar** at the top of the screen (or press / as a shortcut).
2. Type a command, optionally followed by a ticker symbol (e.g., AAPL GP or WEI).
3. Press **Enter**. The corresponding panel opens in the workspace.
4. Type HELP at any time to browse all available commands with descriptions and examples.

Panel focus and command routing

When you execute a command from the Command Bar, the resulting data needs a place to display. QSTMarkets uses a "focus" system to determine where new commands are opened.

At any given time, one panel in your workspace is the active or focused panel. You can easily identify this focused panel by its distinct orange top border. By default, the next command you execute from the Command Bar will open directly within this active panel.

If you want to open a command in a different panel, changing the destination is simple. Just click anywhere inside the panel you want to use as your target. Its top border will immediately turn orange to confirm it has focus. Once the desired panel is highlighted, any new command you type into the Command Bar will load in that specific location.



Section 2 - Commands by category

2.1 Charts

Commands in this category open price and comparison charts. They all require a ticker symbol to function properly.

GP - Graph price

Command: GP

Category: Charts

Requires ticker: Yes

Overview

The Graph price command generates an interactive candlestick chart for a specified asset, providing a visual representation of historical and real-time price action. Traders and analysts use this fundamental tool to identify trends, support and resistance levels, and potential entry or exit points using built-in technical overlays.

How to use it

Focus the Command Bar, type a ticker symbol followed by GP (for example, AAPL GP), and press Enter. The terminal will spawn a new chart panel. You can interact with the chart by zooming in and out using your mouse wheel or trackpad, and panning across historical data by clicking and dragging. The timeframe selector at the top of the panel allows you to switch between intraday intervals and longer-term daily views.

Reading the output

The central area displays traditional candlestick bars (green for up days, red for down days) mapped against a price axis on the right. Volume is represented by the bar chart at the bottom of the price graph. By default, the chart automatically overlays several key technical indicators: Simple Moving Averages (20, 50, and 200 periods), an Exponential Moving Average (20 periods), and Bollinger Bands to help visualize volatility.

Data sources and refresh rate

Live price updates are streamed continuously via WebSocket connections during active market hours. Intraday and historical OHLCV (Open, High, Low, Close, Volume) data are fetched on demand when the chart is instantiated or when the timeframe is altered.

Tips and caveats

- The GP command supports a wide variety of assets beyond US equities, including crypto spot pairs (BTCUSD GP), precious metals (XAUUSD GP), and energy commodities (WTIUSD GP).
- For after-hours or weekend viewing, the chart will display the last recorded closing price and halt real-time updates until the market reopens.
- Use this in conjunction with the DES command to view the technical chart alongside fundamental corporate data.



COMPARE - Compare two tickers

Command: COMPARE

Category: Charts

Requires ticker: Yes (Requires two tickers)

Overview

The Compare two tickers command allows users to chart the relative performance of two different assets over a specified timeframe. This is essential for pairs trading analysis, evaluating a stock's performance against a benchmark ETF, or correlating different asset classes to observe market divergence.

How to use it

Type COMPARE followed by the two ticker symbols you wish to analyze (for example, COMPARE AAPL MSFT). Once the panel opens, you can adjust the lookback window using the timeframe toggles (1M, 3M, 6M, 1Y, 3Y, 5Y) located at the top of the chart.

Reading the output

Instead of absolute prices, the Y-axis displays normalized percentage returns. Both asset series are anchored to 0% at the start date of the selected timeframe. As time progresses along the X-axis, the lines diverge, clearly illustrating which asset outperformed the other on a relative

basis over that exact period. A legend indicates which color corresponds to which ticker.

Data sources and refresh rate

Data is sourced from historical daily close prices. The chart calculates the percentage change dynamically based on the starting date of the chosen timeframe. This data does not auto-refresh continuously; it calculates once upon execution and upon timeframe changes.

Tips and caveats

- You can cross-compare different asset classes. For instance, comparing a tech stock against a cryptocurrency (COMPARE NVDA BTCUSD) to view risk-on asset correlation.
- Since the chart relies on a common start date, ensure both assets were publicly trading during the selected timeframe. If one asset went public halfway through the requested window, the chart may behave unexpectedly or throw an error.



2.2 Fundamentals

Commands in this category display company-level fundamental data: descriptions, financial statements, earnings, dividends, ownership, and insider activity.

DES - Description

Command: DES

Category: Fundamentals

Requires ticker: Yes

Overview

The Description command serves as the primary tear sheet for any publicly traded company. It aggregates high-level corporate information, current valuation metrics, and institutional ownership into a single, easily digestible view. It is typically the first command an analyst runs when researching a new stock.

How to use it

Type a ticker symbol followed by DES (for example, MSFT DES). The panel will populate with several distinct sections detailing the company's profile. You can scroll through the panel to review different fundamental blocks.

Reading the output

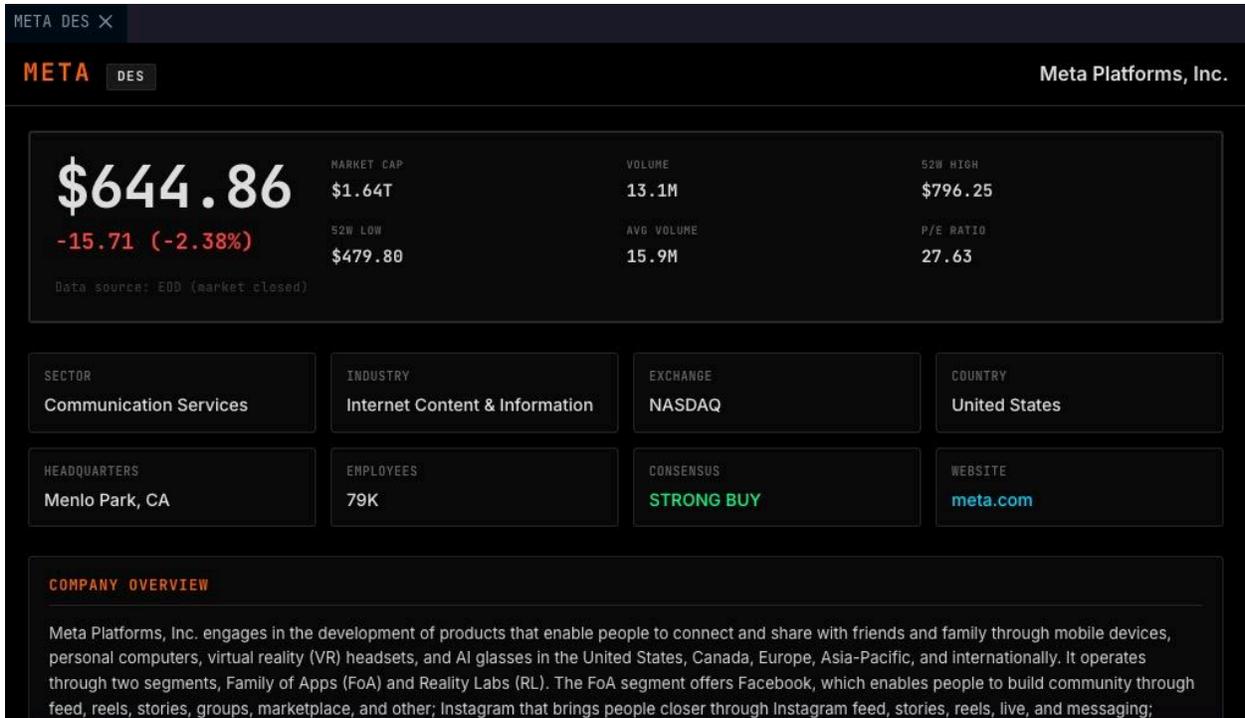
The top section provides the company's sector, industry classification, headquarters location, and employee count. Below this, you will find key valuation metrics like P/E ratio, Earnings Per Share (EPS), and Dividend Yield. A section on management lists key executives alongside their disclosed compensation. Further down, the panel highlights major institutional holders (sourced from 13F filings), analyst consensus (Buy/Hold/Sell ratings), and upcoming catalyst dates for earnings and dividends.

Data sources and refresh rate

Data is aggregated across multiple APIs to provide a comprehensive view. The fundamental profile data is largely static and updated periodically, while pricing multiples and upcoming dates are refreshed daily based on the latest market close and corporate announcements.

Tips and caveats

- This command is highly recommended as a starting point before diving into deep financial statements via the FA command.
- Executive compensation figures reflect the most recently completed fiscal year's disclosures and may not represent real-time salaries.



FA - Financial analysis

Command: FA

Category: Fundamentals

Requires ticker: Yes

Overview

The Financial analysis command provides access to a company's core financial statements. It replaces the need to manually parse through complex SEC 10-K or 10-Q filings by presenting standardized Income Statements, Balance Sheets, and Cash Flow statements.

How to use it

Enter your ticker followed by FA (for example, GOOGL FA). The panel uses a tabbed interface. Click the tabs at the top to navigate between the Income Statement, Balance Sheet, and Cash Flow views. A toggle allows you to switch between Annual and Quarterly reporting periods.

Reading the output

Each statement displays line items organized chronologically. In addition to raw reported figures, the panel calculates derived margins, Compound Annual Growth Rates (CAGR), Return on Equity (ROE), and Return on Assets (ROA). To the right of key line items, you will notice trend sparklines - tiny, inline charts that instantly visualize the directional trend of that specific metric

over the displayed periods.

Data sources and refresh rate

Financial data is sourced from standardized public filings. The data is updated quarterly as companies release their earnings reports.

Tips and caveats

- Standardized financial data may occasionally group unique, company-specific line items into broader categories for comparability. Always refer to the raw SEC filings if a highly specific accounting treatment is critical to your thesis.

METRIC	TREND	FY 2025	FY 2024	FY 2023	FY 2022
Total Revenue		\$185.02B	\$187.44B	\$171.84B	\$156.74B
Gross Profit		N/A	N/A	N/A	N/A
Operating Income		\$2.91B	\$12.78B	\$9.30B	\$10.31B
Net Income		\$2.70B	\$6.01B	\$10.13B	\$9.93B
EPS Basic		\$3.33	\$6.45	\$7.35	\$6.17
EPS Diluted		\$3.27	\$6.37	\$7.32	\$6.13
DERIVED METRIC					
Gross Margin		N/A	N/A	N/A	N/A
Operating Margin		1.57%	6.82%	5.41%	6.58%

SOURCE: SEC | YEARS COVERED: 10

RV - Relative valuation

Command: RV

Category: Fundamentals

Requires ticker: Yes

Overview

The Relative valuation command automatically builds a peer-comparison matrix. It helps investors determine if a stock is trading at a premium or a discount compared to its closest competitors within the same sector, a crucial step in fundamental equity research.

How to use it

Type a ticker followed by RV (for example, NVDA RV). The panel will generate a data table comparing your target company against peers.

Reading the output

The target company is displayed alongside its 7 closest sector peers. These peers are selected algorithmically based on the log-distance of their market capitalizations to ensure realistic comparisons. The table displays key valuation multiples: Price-to-Earnings (P/E), Price-to-Book (P/B), Enterprise Value-to-EBIT (EV/EBIT), and Price-to-Sales (P/S). Sector medians are calculated and highlighted at the bottom, allowing you to quickly spot if your target stock is overvalued (red/higher than median) or undervalued (green/lower than median) relative to the group.

Data sources and refresh rate

Calculations rely on the latest closing prices and trailing twelve-month (TTM) fundamental data. Multiples are recalculated dynamically upon command execution.

Tips and caveats

- The algorithmic peer selection is strictly sector and market-cap driven. It may occasionally pull in a company with a different core business model if it shares the same broad sector classification.

NVDA DES		ACLX DES		BG DES		DOW RV		IBM RV X	
IBM RV TECHNOLOGY								7 PEERS	
MEDIAN P/E		MEDIAN P/B		MEDIAN EV/EBIT		MEDIAN P/S			
61.8		11.4		54.6		9.3			
SYMBOL	COMPANY	PRICE	MKT CAP	REVENUE	P/E	P/B	EV/EBIT	P/S	
IBM	International Business Machines...	\$245.28	\$228.7B	\$67.5B	21.6	7.0	N/A	3.39	
TXN	Texas Instruments Incorporated ...	\$282.67	\$185.3B	\$17.7B	37.0	11.4	32.5	10.48	
SHOP	Shopify Inc. - Class A Subordin...	\$121.87	\$157.9B	\$11.6B	128.3	11.7	106.5	13.67	
ANET	Arista Networks, Inc. Common St...	\$124.60	\$156.8B	\$9.0B	44.7	12.7	40.2	17.41	
QCOM	QUALCOMM Incorporated - Common ...	\$138.13	\$151.6B	\$44.3B	27.4	N/A	13.0	3.42	
PLTR	Palantir Technologies Inc. - CL...	\$147.22	\$346.7B	\$4.5B	213.4	46.9	244.2	77.47	
ACN	Accenture plc Class A Ordinary ...	\$209.89	\$130.7B	\$17.6B	92.5	4.2	58.2	7.43	
GLW	Corning Incorporated Common Sto...	\$147.57	\$126.0B	\$15.6B	78.9	10.7	54.6	8.06	
Sector median					61.8	11.4	54.6	9.27	

EE - Earnings estimates

Command: EE

Category: Fundamentals

Requires ticker: Yes

Overview

The Earnings estimates command tracks a company's historical ability to beat, meet, or miss Wall Street consensus estimates. Analyzing a company's earnings surprise history can provide insight into management's tendency to under-promise and over-deliver.

How to use it

Type a ticker followed by EE (for example, AMZN EE). The panel will display historical performance data and forward-looking estimates.

Reading the output

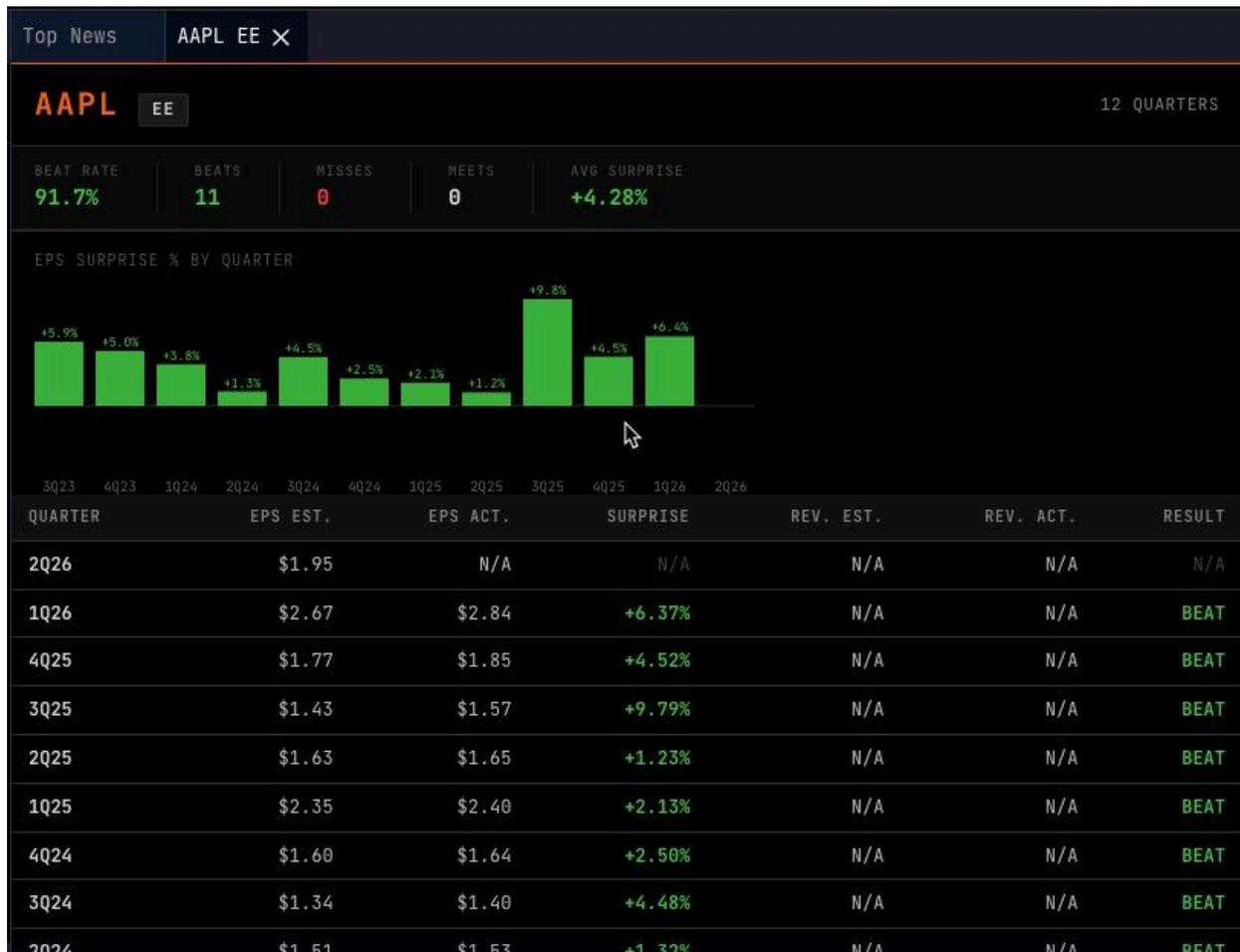
The visual centerpiece is a bar chart displaying the last 12 quarters of Earnings Per Share (EPS), plotting the reported actuals against the analyst estimates. A percentage surprise metric accompanies each quarter. The panel also calculates the aggregate "beat rate" (how often they exceed estimates) and the average surprise magnitude. Below the EPS data, revenue estimates for upcoming quarters are also provided.

Data sources and refresh rate

Consensus estimate data is aggregated from major financial data providers. Actuals are updated immediately following quarterly earnings announcements.

Tips and caveats

- A high historical beat rate does not guarantee future beats. Use this tool to gauge the predictability of a company's earnings rather than as a strict forecasting mechanism.



DVDF - Dividends & yield

Command: DVDF

Category: Fundamentals

Requires ticker: Yes

Overview

Designed for income-focused investors, the Dividends & yield command provides a comprehensive view of a company's dividend payout history, yield trends, and critical

upcoming dates required for dividend capture strategies.

How to use it

Type a ticker followed by DVDF (for example, JNJ DVDF).

Reading the output

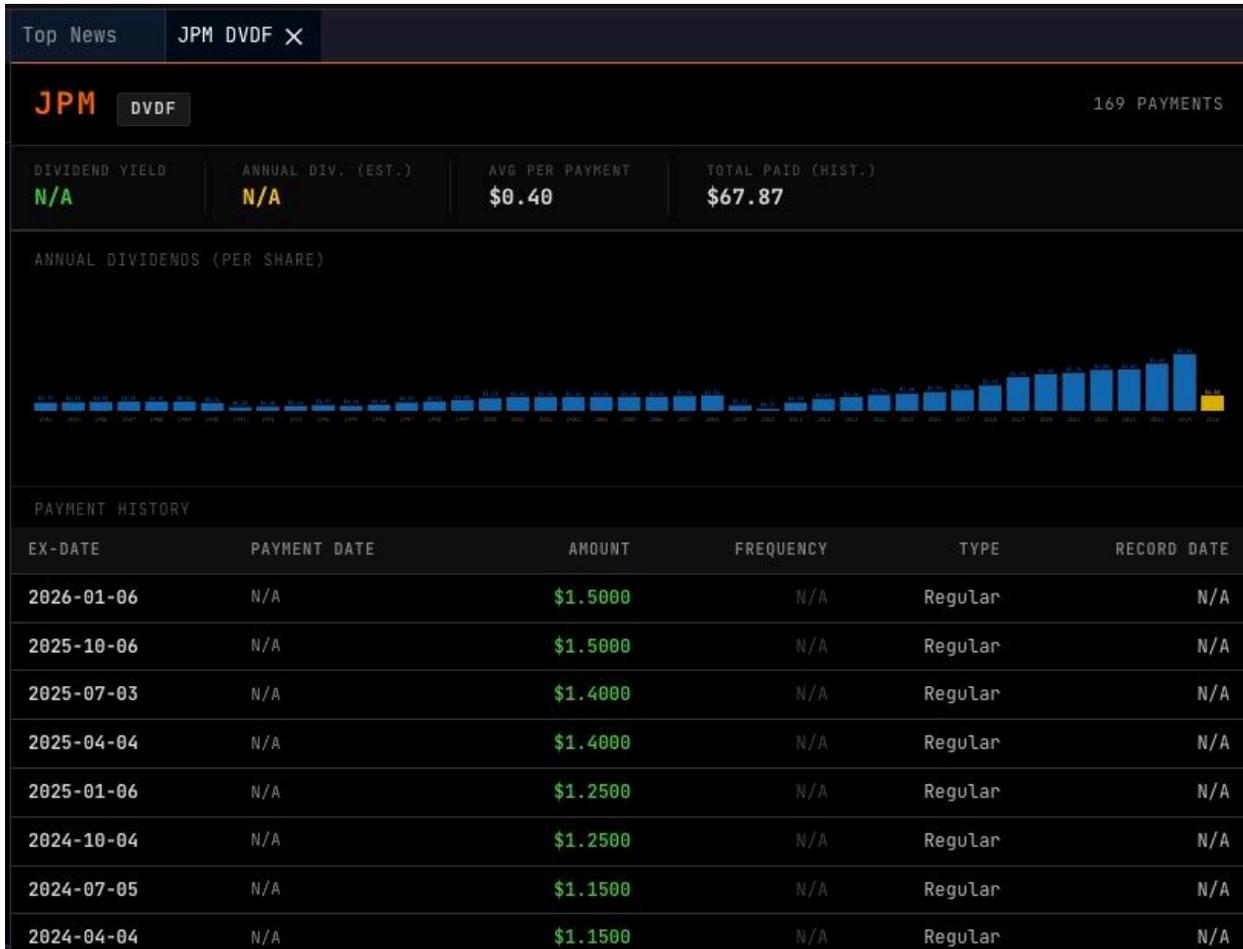
The top of the panel displays the current forward dividend yield, calculated dynamically using the latest traded price. Below this, you will find the critical dates for the current or upcoming payout: the Ex-date (the date you must hold the stock to receive the dividend), Record date, and Payment date, along with the payout frequency (e.g., Quarterly, Annual). The bottom section features a trend chart visualizing the annual dividend growth over the available historical period.

Data sources and refresh rate

Dividend declarations and historical payout records are sourced from corporate actions databases. Yields update continuously based on current market prices.

Tips and caveats

- Be aware that special, one-time dividends might spike the historical trend chart. Focus on the standard recurring payout frequency for long-term income planning.
- If a stock does not pay a dividend, the panel will return a "No dividend history found" message.



INS - Insider trades

Command: INS

Category: Fundamentals

Requires ticker: Yes

Overview

The Insider trades command lists recent transactions made by corporate insiders (directors, officers, and major shareholders). Tracking whether executives are buying or selling their own company's stock is a powerful signal of internal confidence.

How to use it

Type a ticker followed by INS (for example, AAPL INS). The panel presents a chronological ledger of recent insider activity.

Reading the output

The table details the transaction date, the insider's name and title, the transaction type (Buy, Sell, or Award/Grant), the number of shares transacted, and the execution price. Direct links to the original SEC Form 4 filings are provided for verification.

Data sources and refresh rate

Data is sourced primarily from finvizfinance for rapid delivery, with an automatic fallback mechanism to direct SEC EDGAR database queries to ensure accuracy and completeness.

Tips and caveats

- Not all insider sales are bearish signals; executives often sell shares on pre-scheduled 10b5-1 plans for tax or diversification purposes. However, cluster buying by multiple insiders on the open market is generally considered a strong bullish indicator.

Top News		BAC INS ×							
BAC		INS		Bank of America Corporation Common Stock					FINVIZ
TRANSACTIONS		BUYS	SALES						PAGE
68		29	39						1 / 4
DATE	OWNER	RELATIONSHIP	TYPE	SHARES	PRICE	VALUE	TOTAL HELD		
Mar 03 '26	Athanasia Dean C	Co-President	SALE	136.6K	\$50.21	\$6.86M	558.5K		
Mar 05 '26	Thomas Scrivener	Officer	SALE	50.0K	\$49.80	\$2.49M	—		
Mar 05 '26	Sheri Bronstein	Officer	SALE	60.0K	\$50.00	\$3.00M	—		
Mar 04 '26	James DeMare	Officer	SALE	83.8K	\$50.10	\$4.20M	—		
Feb 27 '26	Borthwick Alastair M	Executive Vice President & CFO	SALE	68.0K	\$50.24	\$3.42M	327.8K		
Mar 03 '26	Dean Athanasia	officer	SALE	136.6K	\$49.73	\$6.79M	—		
Feb 27 '26	Alastair Borthwick	Officer	SALE	68.0K	\$50.24	\$3.42M	—		
Feb 25 '26	BANK OF AMERICA CORP /DE/	10% Owner	BUY	8	\$12.88	\$103.00	8		
Feb 25 '26	BANK OF AMERICA CORP /DE/	10% Owner	SALE	8	\$12.96	\$104.00	0		
Feb 17 '26	BANK OF AMERICA CORP /DE/	10% Owner	BUY	1.4K	\$10.74	\$15.0K	1.4K		
Feb 17 '26	BANK OF AMERICA CORP /DE/	10% Owner	SALE	1.4K	\$10.74	\$15.0K	0		
Feb 02 '26	BANK OF AMERICA CORP /DE/	10% Owner	SALE	2.9K	\$3.05	\$8.9K	231.1K		
Jan 26 '26	BANK OF AMERICA CORP /DE/	10% Owner	BUY	343	\$12.54	\$4.3K	343		

Finviz - SEC EDGAR Form 4 - directors, officers, 10%+ owners CACHED

INSB - Insider buys feed

Command: INSB

Category: Fundamentals

Requires ticker: No

Overview

The Insider buys feed acts as a market-wide scanner, aggregating the latest open-market purchases by corporate insiders across all publicly traded US equities. It helps users discover new investment ideas backed by management conviction.

How to use it

Simply type INSB in the Command Bar and press Enter.

Reading the output

The panel displays a continuous, sorted feed of up to 200 of the most recent insider purchase transactions. It includes the ticker symbol, company name, insider name, transaction value, and share count.

Data sources and refresh rate

Sourced from market-wide aggregator feeds (Finviz). The feed is automatically cached and refreshed every 10 minutes to balance speed and API rate limits.

Tips and caveats

- Use this command to find tickers to research further. Once you spot an interesting large purchase on INSB, run DES and FA on that specific ticker to understand the underlying business.

NVDA CN		Top Movers	Insider Sales	Insider Buys X			
INSB Latest insider buys				FINVIZ			
TRANSACTIONS		PAGE		CACHED			
200		1 / 8					
TICKER	DATE	OWNER	RELATIONSHIP	TYPE	SHARES	PRICE	
LEE	Mar 03 '26	Hoffmann David Henry	Director	BUY	19.0K	\$9.16	
LEE	Mar 02 '26	Hoffmann David Henry	Director	BUY	19.0K	\$8.85	
LEE	Feb 27 '26	Hoffmann David Henry	Director	BUY	15.2K	\$9.11	
TPL	Mar 02 '26	HORIZON KINETICS ASSET ...	10% Owner	BUY	1	\$524.01	
SKWD	Feb 27 '26	McHarg Taryn Leonie	CFD - Apollo	BUY	200	\$46.60	
GCBC	Mar 02 '26	Cannucciari Christopher	Director	BUY	1.3K	\$22.05	
SRBK	Mar 03 '26	Viotto Neil C	EVP and COO	BUY	1.0K	\$16.83	
AVBC	Mar 02 '26	Cozzone Robert D	President & CEO	BUY	1.1K	\$18.79	
BHB	Mar 02 '26	Colter David M	Director	BUY	500	\$32.54	
AVBC	Mar 02 '26	Karmelek Nicolas	EVP and CRO	BUY	1.1K	\$18.59	
LEE	Mar 02 '26	Quint Digital Ltd	10% Owner	BUY	20.5K	\$8.87	
SKWD	Mar 02 '26	Peirce Christopher Locke	Director	BUY	3.2K	\$47.30	
IVR	Feb 27 '26	Waldner Robert	Director	BUY	1.0K	\$8.45	
FOSE	Mar 02 '26	Mastrangelo Joe	Chief Executive Officer	BUY	40.0K	\$5.75	
Source: Finviz - SEC Form 4 - directors, officers, 10%+ owners							REFRESH

INSS - Insider sales feed

Command: INSS

Category: Fundamentals

Requires ticker: No

Overview

The counterpart to INSB, the Insider sales feed aggregates the latest insider selling activity across the broader market. It allows users to monitor heavy selling volume by executives, which

could highlight overvalued sectors or individual companies.

How to use it

Type INSS and press Enter.

Reading the output

Similar in structure to INSB, this panel shows the most recent 200 insider sales transactions sorted chronologically. It details the ticker, insider role, transaction size, and price.

Data sources and refresh rate

Sourced from Finviz and cached automatically every 10 minutes.

Tips and caveats

- As mentioned in the INS command, insider sales are less predictive than insider buys. Look for unusually large liquidations or coordinated selling by multiple executives rather than routine algorithmic sales.

NVDA CN		Top Movers		Insider Sales X		
INSS		Latest insider sales				FINVIZ
TRANSACTIONS		PAGE		CACHED		
200		1 / 8				
TICKER	DATE	OWNER	RELATIONSHIP	TYPE	SHARES	PRICE
MATX	Mar 03 '26	Park Kuuhaku T	Officer	SALE	2.0K	\$169.38
VZ	Mar 02 '26	Stillwell Mary-Lee	SVP and Controller	SALE	8.6K	\$50.00
VST	Mar 03 '26	Kirby Carrie Lee	Officer	SALE	60.0K	\$154.68
WM	Mar 02 '26	Watson Michael J.	Sr. VP-Chief Customer ...	SALE	17.3K	\$241.81
WM	Mar 02 '26	Hemmer Tara J.	SVP & Chief Sustainabi...	SALE	4.8K	\$241.83
MATX	Mar 03 '26	Taylor Jason Lee	Officer	SALE	3.0K	\$165.70
VICR	Mar 02 '26	Fendelelet Quentin A.	Corp. VP - CAO	SALE	2.3K	\$204.72
CBLL	Mar 03 '26	Chao Xingjuan	Officer	SALE	39.0K	\$17.80
LSCC	Mar 02 '26	Stevens Tonya	CVP, Chief Accounting ...	SALE	3.2K	\$95.38
FMAO	Mar 02 '26	Faust Eric D	Chief Risk Officer	SALE	275	\$25.92
MATX	Mar 03 '26	Rascon Laura L	Officer	SALE	1.0K	\$168.88
AVBH	Mar 02 '26	ROSINUS MIKE	Director	SALE	2.5K	\$29.01
MEG	Mar 03 '26	Afsari Nasym	Officer	SALE	43.3K	\$28.37
BOOT	Mar 03 '26	Allison Jonathan	Officer	SALE	3.0K	\$47.88
Source: Finviz - SEC Form 4 - directors, officers, 10%+ owners						REFRESH

UPDN - Upgrades & downgrades

Command: UPDN

Category: Fundamentals

Requires ticker: Optional

Overview

The Upgrades & downgrades command tracks the shifting sentiment of Wall Street analysts. Changes in analyst ratings often act as short-term price catalysts, making this a valuable tool

for swing traders and active investors.

How to use it

This command has two modes. Type UPDN without a ticker to view a market-wide summary of recent rating changes. Alternatively, type a ticker followed by UPDN (for example, AAPL UPDN) to see the specific history of analyst actions for that single company.

Reading the output

In standalone mode, the panel shows recent actions for roughly 55 major S&P 100 stocks over the last 21 days. Action badges are color-coded for quick scanning: green indicates an Upgrade or Initiation of coverage, red indicates a Downgrade, and gray signifies a Maintain or Reiterate rating. The table includes the firm issuing the rating and the new price target if available.

Data sources and refresh rate

Data is sourced from yfinance. To optimize performance, the data is cached for 2 hours.

Tips and caveats

- Market-wide UPDN is best checked pre-market to gauge the morning's narrative. Ticker-specific UPDN is useful when trying to understand why a specific stock might be experiencing unusual volume.

Crypto News		Analyst Ratings X			
UPDN		ANALYST RATINGS		100 ratings	
DATE	SYMBOL	FIRM	ACTION	FROM	TO
2026-03-06	SBUX	DA Davidson	INITIATION	--	Neutral
2026-03-06	ORCL	Jefferies	MAINTAIN	Buy	Buy
2026-03-06	ORCL	TD Cowen	MAINTAIN	Buy	Buy
2026-03-06	NFLX	CFRA	UPGRADE	Hold	Buy
2026-03-06	NFLX	B of A Securities	MAINTAIN	Buy	Buy
2026-03-06	MCD	Tigress Financial	MAINTAIN	Buy	Buy
2026-03-06	COST	JP Morgan	MAINTAIN	Overweight	Overweight
2026-03-06	COST	BMO Capital	MAINTAIN	Outperform	Outperform
2026-03-06	COST	Telsey Advisory Group	MAINTAIN	Outperform	Outperform
2026-03-06	COST	DA Davidson	MAINTAIN	Neutral	Neutral
2026-03-06	COST	Truist Securities	MAINTAIN	Hold	Hold
2026-03-06	COST	BTIG	MAINTAIN	Buy	Buy
2026-03-06	AVGO	Morgan Stanley	MAINTAIN	Overweight	Overweight
2026-03-06	ADBE	Citigroup	MAINTAIN	Neutral	Neutral

yfinance - analyst ratings for major US equities (S&P 100, last 21 days) CACHED

2.3 News

Commands in this category surface curated news feeds segmented by topic or asset class.

CN - Company news

Command: CN

Category: News

Requires ticker: Yes

Overview

The Company news command streams the latest headlines and press releases specifically related to your targeted ticker. Staying updated on company-specific news is vital for

understanding sudden price movements and tracking corporate developments.

How to use it

Type a ticker followed by CN (for example, TSLA CN). The panel provides a scrolling list of news articles. Use the interactive filters at the top to narrow results by publication source, date range, and analyzed sentiment.

Reading the output

Each news item displays a headline, timestamp, source publication, and a brief snippet. When available (via MarketAux), an automated sentiment score is attached, giving a quick indication of whether the news is generally perceived as positive, negative, or neutral. Clicking an article headline opens the full story in a new browser tab.

Data sources and refresh rate

News is primarily sourced from Finnhub, with MarketAux serving as a secondary provider that includes sentiment scoring capabilities.

Tips and caveats

- The sentiment score is generated by natural language processing algorithms and is not foolproof. Always read the actual article context, especially for highly technical or regulatory news.

NVDA CN ✕

CN NVDA Company News 50 articles **Finnhub** + Sentiment

DATE 7d 14d **30d** SOURCE SeekingAlpha Yahoo

 **YAHOO** · Today 18:46 · company
Is AMD Stock Going to \$300?
 Rapid income growth and an attractive forward P/E ratio could lead to more investors buying.

 **YAHOO** · Today 18:35 · company
Could Buying Chewy Today Set You Up for Life?
 Chewy stock offers investors an opportunity right now.

 **YAHOO** · Today 18:23 · company
This International Bond ETF Could Offer High Yields -- and Higher Risk
 What if a bond fund could earn 10% or more per year? It's possible -- but there are downsides.

 **YAHOO** · Today 18:07 · company
Nvidia Stock Has Fallen Almost 5% This Year. Is Now a Good Time to Buy?
 Accelerating growth and stellar guidance haven't been enough to help the stock in 2026.

 **YAHOO** · Today 18:00 · company
What Drove Polestar Stock Down 29% This Week?
 The answer isn't obvious, but there are clues.

 **YAHOO** · Today 17:56 · company
The Trade Desk vs. AppLovin: Which AI-Powered Adtech Stock Is the Better Buy?
 Both stocks have been hit hard by competitive pressure, but one is

Source: Finnhub · 2026-02-05 to 2026-03-07

TOP - Top news

Command: TOP

Category: News

Requires ticker: No

Overview

The Top news command provides a persistent, always-on feed of the most important macroeconomic and general market headlines. It acts as the terminal's global news ticker, keeping you aware of breaking developments that could impact the broader market.

How to use it

Type TOP and press Enter. Leave this panel open on the side of your workspace to act as a live ticker.

Reading the output

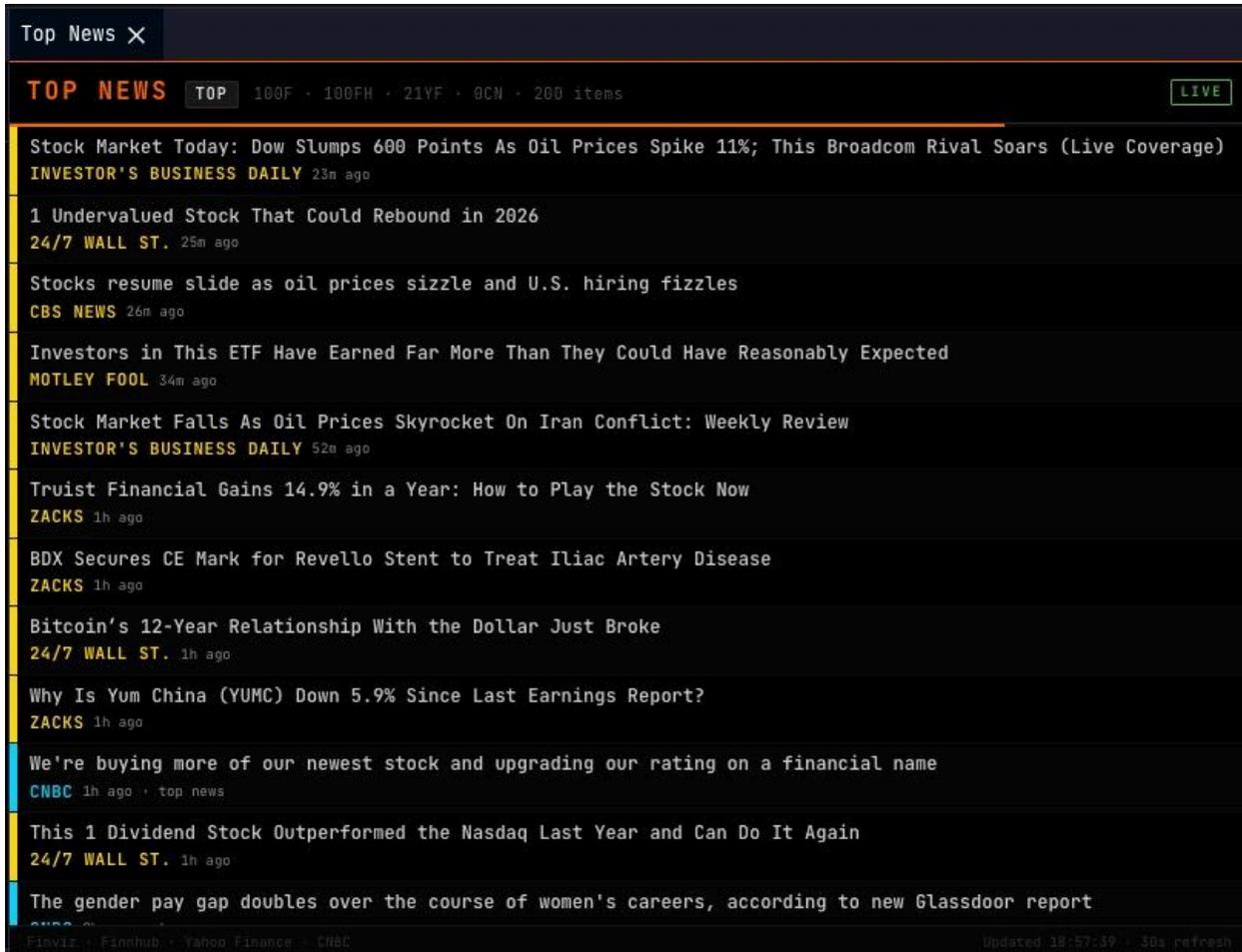
The panel displays a continuous, chronological list of headlines. The feed interleaves articles on a 1-for-1 basis from different aggregator sources to ensure a diverse perspective without being dominated by a single publisher.

Data sources and refresh rate

Headlines are aggregated from Finviz and Finnhub. The panel automatically refreshes every 30 seconds to ensure you see breaking news almost instantly.

Tips and caveats

- Due to the high refresh rate, this panel is ideal for day traders who need to react instantly to macroeconomic headlines, central bank announcements, or geopolitical events.



TOPCRYP - Top crypto news

Command: TOPCRYP

Category: News

Requires ticker: No

Overview

Top crypto news filters the noise of the broader market to focus specifically on the cryptocurrency sector. It tracks regulatory developments, protocol updates, and major movements in the digital asset space.

How to use it

Type TOPCRYP in the Command Bar.

Reading the output

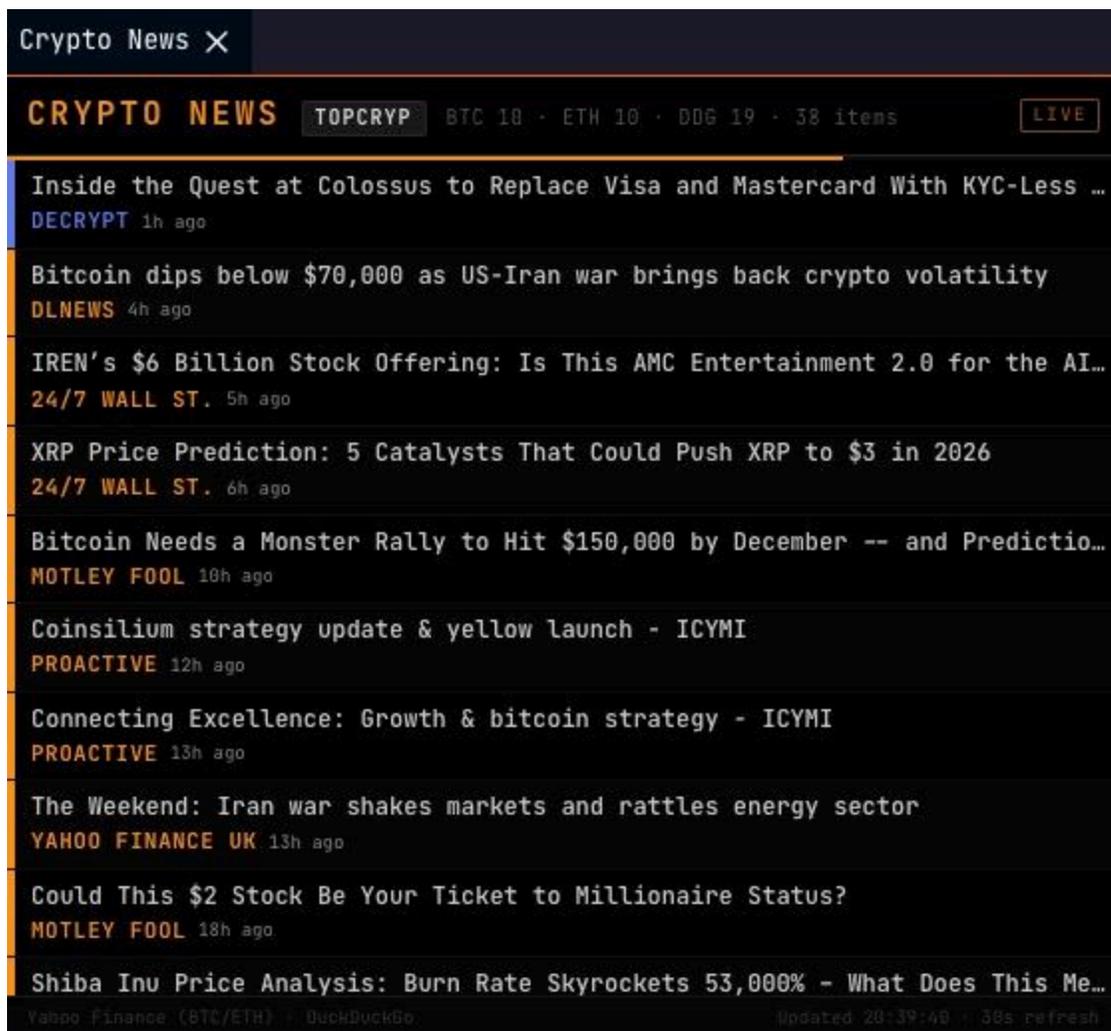
The panel provides a clean list of recent headlines focused on major cryptocurrencies and the blockchain industry. Timestamps and publisher names accompany each link.

Data sources and refresh rate

News is aggregated using Yahoo Finance (tracking BTC-USD and ETH-USD specifically) combined with DuckDuckGo News search algorithms. A background pre-fetch mechanism refreshes the Redis cache approximately every 4 minutes.

Tips and caveats

- Because the crypto market operates 24/7, this feed is highly active during weekends and evenings when traditional equity news feeds are quiet.



TOPMET - Top metals news

Command: TOPMET

Category: News

Requires ticker: No

Overview

This command curates news impacting the precious metals markets, primarily gold and silver. It is essential for commodities traders and investors using metals as inflation hedges.

How to use it

Execute the TOPMET command.

Reading the output

The feed highlights geopolitical events, central bank gold purchasing data, and mining industry news.

Data sources and refresh rate

Data is sourced from Yahoo Finance and DuckDuckGo News. To maintain terminal performance, the endpoint reads from a Redis cache that is refreshed in the background every 4 minutes.

Tips and caveats

- Use this command alongside the GP command for gold (XAUUSD) to correlate price action with breaking geopolitical headlines.

NVDA CN Metals News X

METALS NEWS TOPMET GLD 10 · SLV 10 · DDG 25 · 43 items LIVE

GLD's \$75 Billion Couldn't Shield It From the Tariff-Driven Selloff
24/7 WALL ST. 6h ago

Gold Volatility Surges as U.S.-Iran Tensions Shake US Dollar and Global Marke...
FX EMPIRE 21h ago

Gold, Silver Rate Today (Mar 6) - Live Updates: Gold near Rs 1.60 lakh, silve...
MONEYCONTROL 1d ago

Update: Gold Moves Higher, But Sees Only Mild Support Despite the War and an ...
MT NEWSWIRES 1d ago

Inflation Pressure Intensifying? ETFs May Help Stay Prepared
ZACKS 1d ago

Gold Moves Higher, But Sees Only Mild Support Despite the War on Iran and an ...
MT NEWSWIRES 1d ago

Exchange-Traded Funds, Equity Futures Lower Pre-Bell Friday Amid Fresh Market...
MT NEWSWIRES 1d ago

IAMGOLD's 273% Run Has a Real Reason Behind It
24/7 WALL ST. 1d ago

Gold Surge on Iran Strikes: Can War Risk Send Gold to \$6,500, Silver to \$150?
FX EMPIRE 1d ago

Gold Prices Aren't Doing What You'd Expect. Here's Why Experts Say That's Hap...
INVESTOPEDIA 1d ago

Gold gains on safe-haven demand as Middle East conflict widens
CNBC 2d ago

What gold investing alternatives are worth considering this March?
CBS NEWS ON MSN 2d ago

Yahoo Finance (GLD/SLV) · DuckDuckGo Updated 20:40:28 · 60s refresh

TOPENE - Top energy news

Command: TOPENE

Category: News

Requires ticker: No

Overview

Top energy news tracks the highly volatile energy sector, focusing on crude oil, natural gas,

OPEC decisions, and global supply chain disruptions.

How to use it

Type TOPENE and press Enter.

Reading the output

Headlines cover inventory reports, international energy policy, and corporate news from major oil and gas explorers.

Data sources and refresh rate

Aggregated from DuckDuckGo News and Yahoo Finance (utilizing proxies like USO and UNG ETFs to guide the news fetching). Background pre-fetching updates the cache every 4 minutes.

Tips and caveats

- Pay special attention to this feed on Wednesdays (when US crude inventory data is typically released) and during scheduled OPEC meetings.

NVDA CN Metals News Energy News X

ENERGY NEWS TOPENE USO 10 · UNG 10 · DDG 30 · 46 items LIVE

Wall Street Is Quietly Pricing In \$100 Oil, And These Two Energy Giants Are t...
24/7 WALL ST. 16m ago

Oil Prices Soar Past \$90. Trump Demands 'Unconditional Surrender' From Iran-a...
BARRONS.COM 23h ago

Oil prices soar past \$90. Trump demands 'unconditional surrender' from Iran-a...
BARRON'S 23h ago

Update: WTI Oil Spikes Higher Again as the War on Iran Keeps Persian Gulf Sup...
MT NEWSWIRES 23h ago

U.S. Natural Gas Futures Rise As Iran Conflict Cuts LNG Supply
THE WALL STREET JOURNAL 1d ago

Oil surges 35% this week for biggest gain in futures trading history dating b...
CNBC 1d ago

Oil News: Crude Oil Futures Jump as War Threatens OPEC Production Flows
FX EMPIRE 1d ago

Oil prices continue to climb, hitting highest level in nearly 2 years
CBS NEWS 1d ago

Sector Update: Energy Stocks Rise Premarket Friday
MT NEWSWIRES 1d ago

Exchange-Traded Funds, Equity Futures Lower Pre-Bell Friday Amid Fresh Market...
MT NEWSWIRES 1d ago

Crude Oil Prices Headed for Steepest Weekly Gain since Start of Russia-Ukrain...
MT NEWSWIRES 1d ago

Update: WTI Oil Rises to the Highest Since April 2024 as the War on Iran Cuts...
MT NEWSWIRES 2d ago

Yahoo Finance (US0/UNG) · DuckDuckGo Updated 20:41:24 · 60s refresh

2.4 Markets

Commands in this category provide macro and market-wide views: indices, economic indicators, sector performance, screeners, and AI-generated analysis.

WEI - World indices

Command: WEI

Category: Markets

Requires ticker: No

Overview

The World indices command provides a bird's-eye view of global equity market performance. By tracking major international benchmarks, users can gauge the overall health of the global economy and observe how overnight trading in Asia and Europe might impact the upcoming US session.

How to use it

Type WEI in the Command Bar.

Reading the output

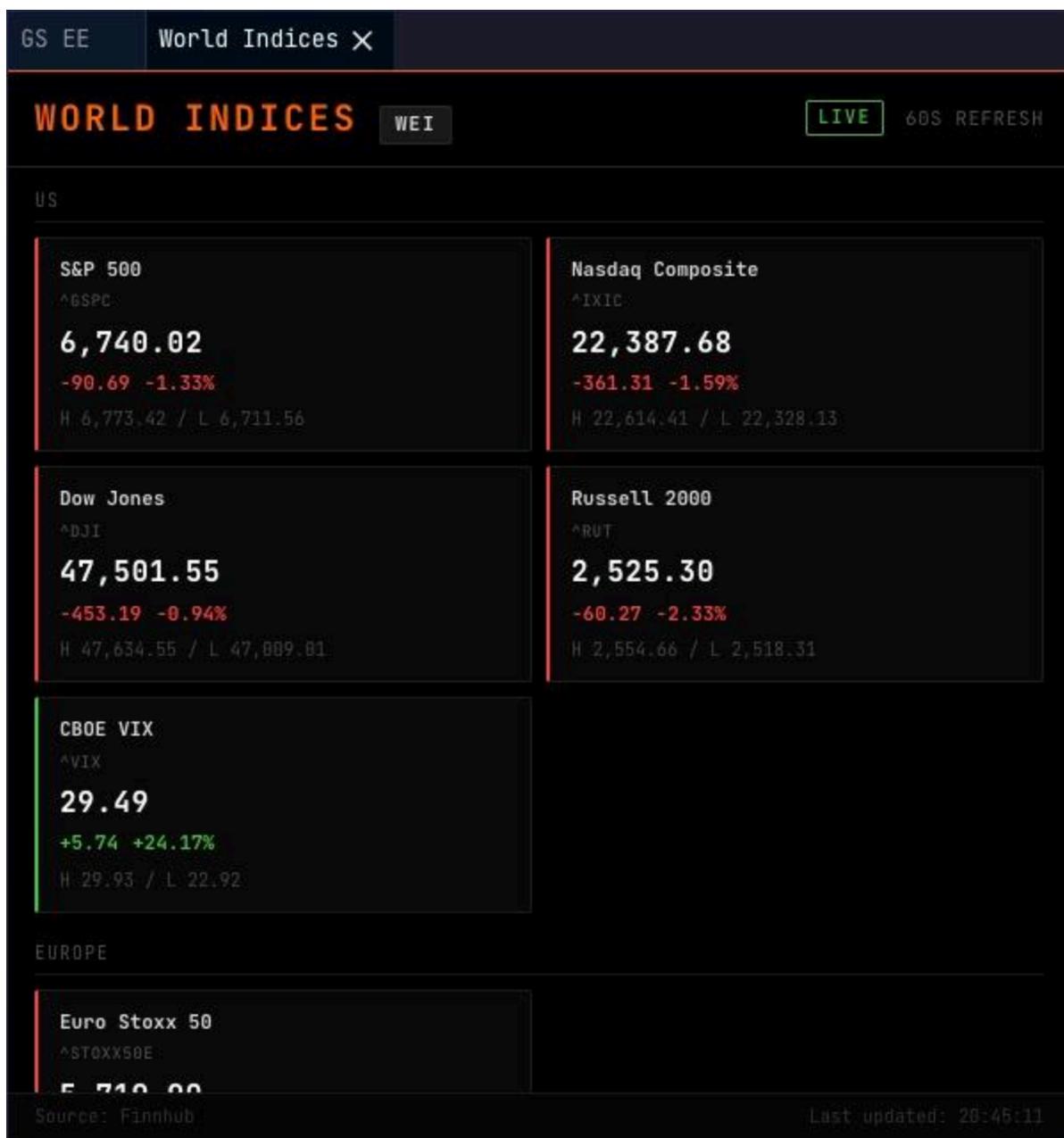
The panel displays a comprehensive table of roughly 15 major global indices (such as the S&P 500, FTSE 100, Nikkei 225, and DAX). The indices are logically grouped by geographical region: US, Europe, Asia-Pacific, and Americas. Each row shows the current index value, the absolute and percentage change for the day, and the intraday High/Low range. Color coding (green/red) makes it easy to assess regional market sentiment at a glance.

Data sources and refresh rate

Index pricing is fetched from standard market data providers and automatically refreshes every 60 seconds to provide near real-time global monitoring.

Tips and caveats

- Because global markets operate in different time zones, some indices will be actively updating while others display the final closing value from their local session. Keep time zones in mind when interpreting the data.



ECO - Economic indicators

Command: ECO

Category: Markets

Requires ticker: No

Overview

The Economic indicators command serves as a consolidated macro dashboard. It aggregates

the most critical data points used by the Federal Reserve and institutional economists to assess the health of the US economy.

How to use it

Type ECO and press Enter.

Reading the output

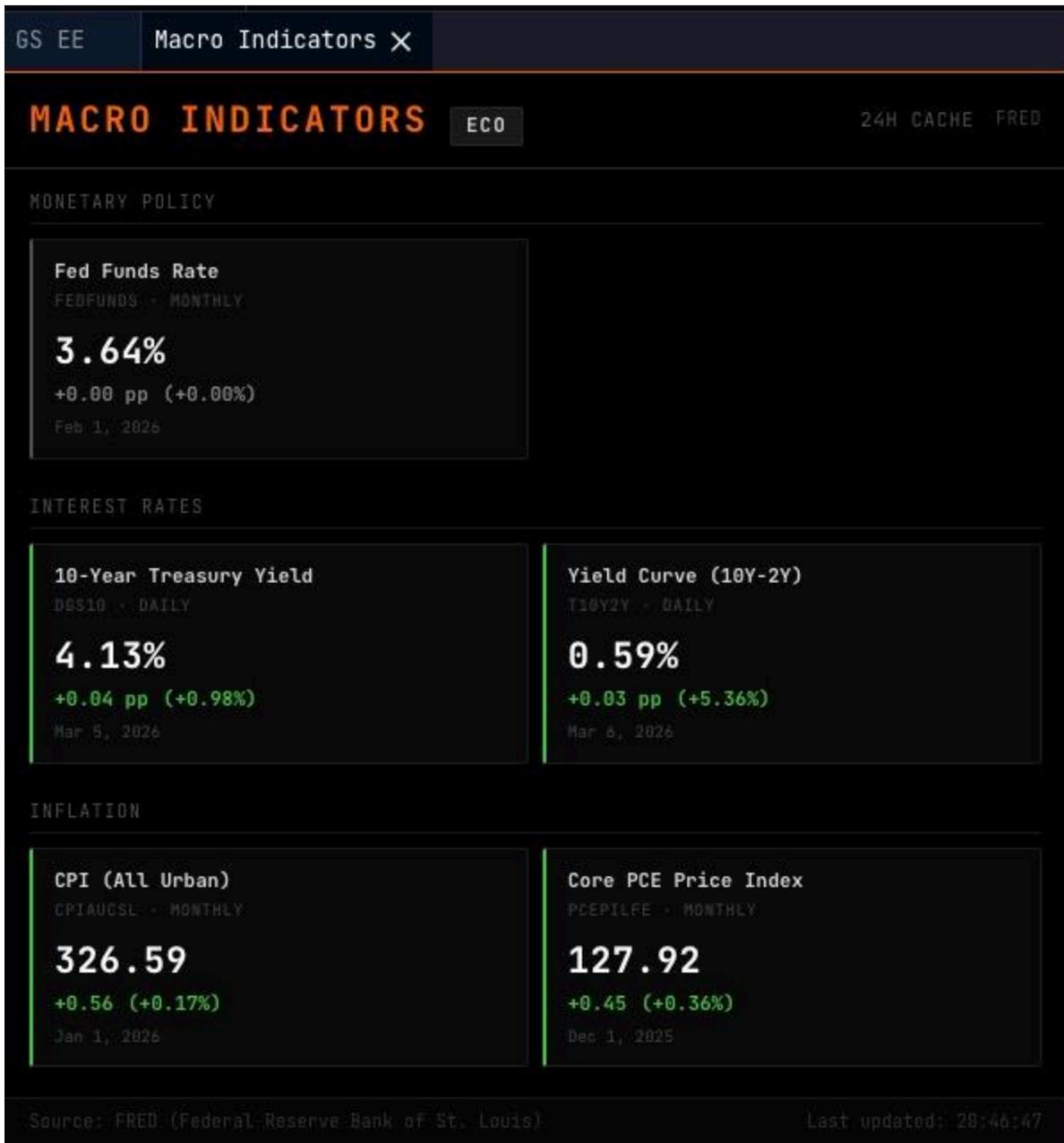
The panel displays a grid of key macro metrics, including the effective Fed Funds Rate, the 10-Year Treasury yield, the yield curve status, CPI (inflation), Core PCE, Unemployment rate, Nonfarm Payrolls, GDP growth, housing starts, and Consumer Sentiment indices. Each metric displays its latest value and the date it was recorded.

Data sources and refresh rate

All data is pulled directly from FRED (Federal Reserve Economic Data). The panel fetches the most recent observations available in the FRED database.

Tips and caveats

- Economic data is released on specific schedules (e.g., jobs data on the first Friday of the month). The ECO panel reflects the latest available data, not live market reactions. Use ECOCAL to anticipate when these numbers will change.



SPER - Sector performance

Command: SPER

Category: Markets

Requires ticker: No

Overview

Understanding which sectors are leading or lagging the market is crucial for portfolio allocation

and momentum trading. The Sector performance command visualizes the daily return of major NASDAQ market sectors, allowing users to instantly spot capital rotation.

How to use it

Type SPER in the Command Bar.

Reading the output

The panel utilizes a diverging bar chart to visualize performance. Sectors are sorted from best-performing at the top to worst-performing at the bottom. Green bars extend to the right for positive performance, while red bars extend to the left for negative performance. This visual structure allows for immediate identification of the day's market drivers.

Data sources and refresh rate

Sector aggregate data is provided by Financial Modeling Prep (FMP) and is refreshed daily.

Tips and caveats

- Sector rotation often signals broader macroeconomic shifts. For example, a sudden rotation out of Technology and into Utilities and Consumer Staples might indicate that the market is adopting a defensive posture.



ECOCAL - Economic calendar

Command: ECOCAL

Category: Markets

Requires ticker: No

Overview

The Economic calendar is an essential planning tool for active traders. It lists scheduled releases of economic data, central bank meetings, and government reports that are likely to cause market volatility.

How to use it

Type ECOCAL and press Enter.

Reading the output

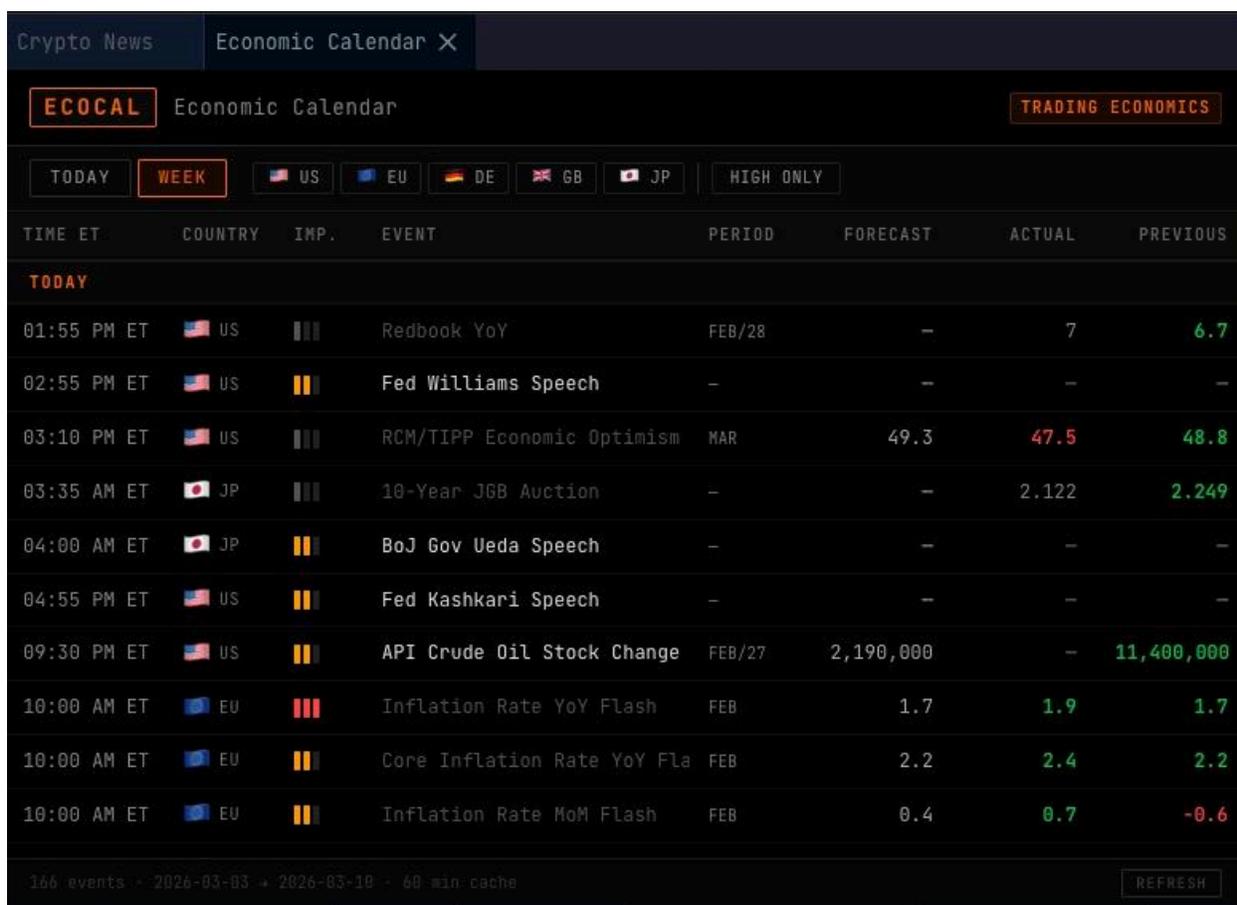
The table lists upcoming events chronologically. Key columns include the date/time (in ET), the country of origin (US, Euro Area, Germany, UK, Japan), the name of the event, and the importance level (Low/Medium/High). Crucially, the table also displays the previous period's value, the consensus forecast, and the actual printed value once the event occurs. Users can filter the calendar by specific country or choose to only display high-importance events.

Data sources and refresh rate

The primary data source is Trading Economics, with an automatic fallback to FMP if the primary API is unavailable. The calendar data is cached and updated every 60 minutes.

Tips and caveats

- High-importance events (like US CPI or FOMC rate decisions) frequently cause extreme short-term volatility. Many day traders use the ECOCAL to know exactly when to flatten their positions to avoid slippage during these releases.



The screenshot shows the ECOCAL Economic Calendar interface. At the top, there are tabs for 'Crypto News' and 'Economic Calendar'. Below this, the 'ECOCAL' logo and 'Economic Calendar' text are visible, along with the 'TRADING ECONOMICS' logo. The interface includes filters for 'TODAY', 'WEEK', and various countries (US, EU, DE, GB, JP), as well as a 'HIGH ONLY' filter. The main table displays the following data:

TIME ET	COUNTRY	IMP.	EVENT	PERIOD	FORECAST	ACTUAL	PREVIOUS
TODAY							
01:55 PM ET	US	III	Redbook YoY	FEB/28	-	7	6.7
02:55 PM ET	US	II	Fed Williams Speech	-	-	-	-
03:10 PM ET	US	III	RCM/TIPP Economic Optimism	MAR	49.3	47.5	48.8
03:35 AM ET	JP	III	10-Year JGB Auction	-	-	2.122	2.249
04:00 AM ET	JP	II	BoJ Gov Ueda Speech	-	-	-	-
04:55 PM ET	US	II	Fed Kashkari Speech	-	-	-	-
09:30 PM ET	US	II	API Crude Oil Stock Change	FEB/27	2,190,000	-	11,400,000
10:00 AM ET	EU	III	Inflation Rate YoY Flash	FEB	1.7	1.9	1.7
10:00 AM ET	EU	II	Core Inflation Rate YoY Fla	FEB	2.2	2.4	2.2
10:00 AM ET	EU	II	Inflation Rate MoM Flash	FEB	0.4	0.7	-0.6

At the bottom of the table, it shows '166 events - 2026-03-03 - 2026-03-10 - 60 min cache' and a 'REFRESH' button.

LEO - Latest equity offerings

Command: LEO

Category: Markets

Requires ticker: No

Overview

The Latest equity offerings command tracks the private placement and exempt offering market. By monitoring SEC Form D filings, investors can see where private capital is flowing and identify public companies raising capital outside of traditional secondary public offerings.

How to use it

Execute the LEO command in the Command Bar.

Reading the output

The panel displays a feed of recent Regulation D exempt offering filings. The table includes details such as the offering amounts (total offering amount, amount sold, and amount remaining), the entity type, the industry group, and the specific exemption codes claimed.

Data sources and refresh rate

Data is sourced from raw SEC EDGAR filings. The data is cached for 60 minutes.

Tips and caveats

- Public companies occasionally use Reg D filings. A sudden large private placement can cause significant dilution and impact the publicly traded share price, making this a useful peripheral monitoring tool.

FILED	FORM	TYPE	INDUSTRY	LOCATION	TOTAL OF...	SOLD
Mar 6, 2026	D/A	Corp	Other	SALEM, OREGON	\$2.0M	\$910K
Mar 6, 2026	D/A	LP	Pooled Fund	DOVER, DELAWARE	\$400K	\$250K
Mar 6, 2026	D/A	Corp	Pooled Fund	CAMANA BAY, GRAN...	—	\$4.0B
Mar 6, 2026	D/A	Corp	Pooled Fund	NEW YORK	\$500.0M	\$76.9M
Mar 6, 2026	D/A	Corp	Pooled Fund	GEORGE TOWN, GRA...	—	\$892.8M
Mar 6, 2026	D/A	Corp	Pooled Fund	WEST PALM BEACH, ...	—	\$995.9M
Mar 6, 2026	D/A	Corp	Pooled Fund	GRAND CAYMAN, CA...	—	\$12.5B
Mar 6, 2026	D/A	Corp	Pooled Fund	GRAND CAYMAN, CA...	—	\$972.4M
Mar 6, 2026	D/A	LP	Pooled Fund	NEW YORK	—	\$125.8M
Mar 6, 2026	D/A	LP	Pooled Fund	NEW YORK	—	\$125.8M
Mar 6, 2026	D/A	Corp	Pooled Fund	GEORGE TOWN, CAY...	—	\$322.2M
Mar 6, 2026	D/A	Corp	Pooled Fund	WEST PALM BEACH, ...	—	\$78.1M
Mar 6, 2026	D/A	Corp	Other Technology	NEW ATHENS, ILLI...	—	\$835K
Mar 6, 2026	D/A	Corp	Pooled Fund	GEORGE TOWN, GRA...	—	\$1.1B

SEC Form D - Regulation D exempt offering filings (Rule 506b / 506c) Source: SEC EDGAR · cached 60 min

RCRO - Recent crowdfunding

Command: RCRO

Category: Markets

Requires ticker: No

Overview

For users interested in early-stage investments and startup capital formation, the Recent crowdfunding command tracks filings related to Regulation Crowdfunding (Reg CF).

How to use it

Type RCRO and press Enter. A client-side search filter is available within the panel to quickly

find specific companies or sectors.

Reading the output

The table details the latest Reg CF SEC filings (Forms C, C/A, C-U). It displays the terms of the offering, including minimum and maximum target raises, the offering deadline, and the security type being offered. It also provides basic company details and the most recent fiscal-year financials submitted with the filing.

Data sources and refresh rate

Sourced from FMP and cached for 60 minutes.

Tips and caveats

- Reg CF investments are highly illiquid and carry significant risk. This data is provided for informational tracking of the startup ecosystem rather than actionable public market trading.

FILED	FORM	LOCATION	SECURITY	PRICE	MIN RAISE	MAX RAISE	DEADLINE
Mar 6, 2026	C/A	Carson City, N...	Other	\$1.00	\$100K	\$1.2M	04-30-2026
Mar 6, 2026	C	TULSA, Oklahoma	Other	\$1.00	\$1.0M	\$5.0M	10-01-2026
Mar 6, 2026	C/A	Rockville, Mar...	Common Sto...	\$0.10	\$10K	\$4.3M	04-30-2026
Mar 6, 2026	C	PORTLAND, Oreg...	Other	\$1.00	\$10K	\$1.2M	04-28-2026
Mar 6, 2026	C	STRASBURG, Vir...	Other	\$1.00	\$75K	\$1.2M	04-29-2026
Mar 6, 2026	C/A	STRASBURG, Vir...	-	-	-	-	-
Mar 6, 2026	C/A	WILMINGTON, De...	Other	\$4.00	\$10K	\$1.2M	04-30-2026
Mar 6, 2026	C	NEW PORT RICHE...	Preferred ...	\$1.00	\$200K	\$800K	07-31-2026
Mar 6, 2026	C	Henderson, Nev...	Other	\$1.00	\$50K	\$618K	04-30-2027
Mar 6, 2026	C	Henderson, Nev...	Other	\$1.00	\$50K	\$500K	04-30-2026
Mar 5, 2026	C/A	Ft Lauderdale, ...	-	-	-	-	-
Mar 5, 2026	C-U	Encino, Califo...	Common Sto...	\$1.50	\$10K	\$1.2M	04-30-2026
Mar 5, 2026	C-U	ALAMEDA, Calif...	Other	\$1.00	\$25K	\$500K	03-02-2026
Mar 5, 2026	C	Fairfield, Cal...	Other	-	\$20K	\$1.2M	04-30-2026
Mar 5, 2026	C	CENTENNIAL, Co...	Debt	\$1.00	\$35K	\$50K	04-09-2026
Mar 5, 2026	C/A	New York, New ...	Other	\$1.00	\$10K	\$750K	03-12-2026
Mar 5, 2026	C	MINNEAPOLIS, M...	Debt	\$1.00	\$10K	\$25K	04-09-2026
Mar 5, 2026	C/A	DUNWOODY, Geor...	-	-	-	-	-

TOPGL - Top movers

Command: TOPGL

Category: Markets

Requires ticker: No

Overview

Top movers is a classic market terminal function that identifies the most active and volatile stocks of the current session. Day traders rely heavily on this data to find stocks "in play" with

high liquidity and large price swings.

How to use it

Type TOPGL and press Enter. The panel features three distinct tabs that you can click to toggle views: Gainers, Losers, and Most Active.

Reading the output

Depending on the active tab, you will see a list of US equities experiencing the largest percentage gains (green text), largest percentage losses (red text), or the highest trading volume (cyan text). Each row shows the ticker symbol, company name, current price, absolute change, percentage change, and cumulative daily volume.

Data sources and refresh rate

The primary data feed is provided by FMP, with yfinance acting as a robust fallback. The underlying data is cached for 15 minutes, but the panel auto-refreshes every 5 minutes to keep the list relatively current during active trading.

Tips and caveats

- Small-cap stocks frequently dominate the Gainers and Losers tabs due to their higher volatility. The Most Active tab is usually dominated by large-cap tech and popular ETFs.

GOOGL FA		Top Movers X				
Top Movers		TOPGL	US Equity Market		50 results	FMP
GAINERS		LOSERS		MOST ACTIVE		
#	SYMBOL	NAME	PRICE	CHG (\$)	CHG (%)	VOLUME
1	DXST	Decent Holding Inc.	\$0.28	+0.13	+83.61%	-
2	PRSO	Peraso Inc.	\$2.04	+1.23	+151.54%	-
3	MOBX	Mobix Labs, Inc.	\$1.04	+0.17	+20.11%	-
4	TPET	Trio Petroleum Corp.	\$1.93	+0.34	+21.38%	-
5	BHAT	Fujian Blue Hat Interactive Entertainment...	\$0.03	-0.00	-6.45%	-
6	NVDA	NVIDIA Corporation	\$177.82	-5.52	-3.01%	-
7	TZA	Direxion Daily Small Cap Bear 3X ETF	\$7.00	+0.46	+7.03%	-
8	ONDS	Ondas Holdings Inc.	\$9.83	-0.66	-6.29%	-
9	TQQQ	ProShares - UltraPro QQQ	\$47.54	-2.26	-4.54%	-
10	SOXS	Direxion Daily Semiconductor Bear 3X ETF	\$45.17	+5.08	+12.67%	-
11	SPDN	Direxion Daily S&P 500 Bear 1X ETF	\$9.67	+0.14	+1.47%	-
12	SOXL	Direxion Daily Semiconductor Bull 3X ETF	\$47.89	-6.91	-12.61%	-
13	NVD	GraniteShares 2x Short NVDA Daily ETF	\$7.44	+0.44	+6.29%	-
14	BITO	ProShares - Bitcoin ETF	\$9.39	-0.42	-4.28%	-
15	AAL	American Airlines Group Inc.	\$11.18	-0.61	-5.17%	-
16	SPY	State Street SPDR S&P 500 ETF Trust	\$672.38	-8.93	-1.31%	-
17	MRVL	Marvell Technology, Inc.	\$89.57	+13.89	+18.35%	-
18	MSTX	Daily Target 2X Long MSTR ETF	\$2.32	-0.25	-9.73%	-
19	QQQ	Invesco QQQ Trust, Series 1	\$599.75	-9.16	-1.50%	-
20	HYG	iShares iBoxx \$ High Yield Corporate Bond...	\$79.69	-0.39	-0.49%	-
21	EONR	EDN Resources Inc.	\$0.67	+0.06	+9.84%	-

INFL - Inflation dashboard

Command: INFL

Category: Markets

Requires ticker: No

Overview

Inflation has a profound impact on monetary policy and asset valuation. The Inflation dashboard provides a dedicated, highly visual breakdown of various inflation metrics in the

United States, allowing users to track the trajectory of consumer and producer prices.

How to use it

Execute the INFL command in the workspace.

Reading the output

The panel displays a comprehensive year-over-year (YoY) percentage chart covering the last 24 months of data. The chart plots multiple data series: Headline CPI, Core CPI (which strips out volatile food and energy costs), CPI-W, PPI Final Demand, Core PPI, and Import Prices. The data points are color-coded to provide immediate context regarding the Federal Reserve's target mandate: green indicates inflation is at or below the 2% target, yellow denotes levels between 2-4%, and red warns of inflation running above 4%.

Data sources and refresh rate

Data is sourced directly from the Bureau of Labor Statistics (BLS). Because inflation reports are released monthly, the dashboard is cached for 24 hours to reduce unnecessary API calls.

Tips and caveats

- Pay close attention to the divergence between Headline and Core CPI. A spike in Headline CPI driven solely by temporary energy prices might be ignored by the market, whereas persistent Core CPI inflation is viewed more seriously.



JOBS - Labor market dashboard

Command: JOBS

Category: Markets

Requires ticker: No

Overview

The Labor market dashboard provides a deep dive into US employment statistics. Employment strength dictates consumer spending and influences the Federal Reserve's dual mandate,

making this panel essential for macro analysis.

How to use it

Type JOBS in the Command Bar.

Reading the output

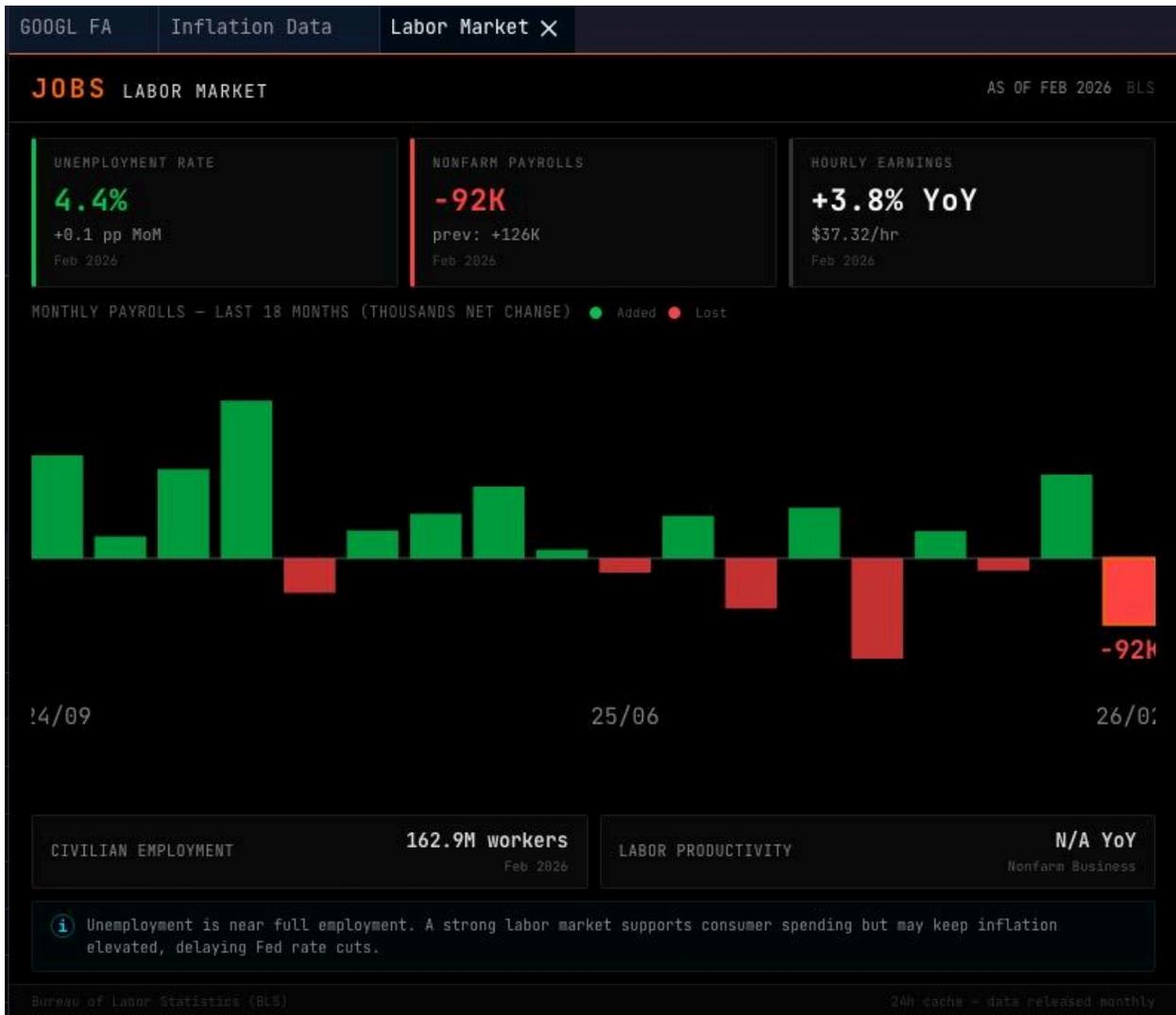
The dashboard highlights the current Unemployment Rate, Nonfarm Payrolls (the net change in jobs created for the month), Civilian Employment levels, Average Hourly Earnings (YoY%), and Nonfarm Labor Productivity. The panel features tabs to filter views between TODAY and WEEK. A visual bar chart illustrates the monthly payroll changes, utilizing green bars for jobs added and red bars for jobs lost. A unique contextual callout at the bottom of the panel explains in plain English what the current employment level implies for Federal Reserve policy decisions.

Data sources and refresh rate

Data is acquired from the BLS. Cached for 24 hours.

Tips and caveats

- The Nonfarm Payrolls number is often subject to significant revisions in subsequent months. Always look at the trend over 3-6 months rather than a single isolated print.



HURG - Unemployment rate history

Command: HURG

Category: Markets

Requires ticker: No

Overview

While the JOBS command focuses on recent prints, the Unemployment rate history command provides a long-term historical perspective. Observing the historical peaks and troughs of unemployment helps users contextualize where the economy sits within the broader macroeconomic cycle.

How to use it

Type HURG and press Enter.

Reading the output

The panel generates an SVG area/line chart spanning 15 years, plotting approximately 180 monthly observations of the seasonally adjusted unemployment rate. The chart visually highlights historical extremes, noting the peak during the COVID-19 pandemic (April 2020: 14.7%) and the peak of the Great Financial Crisis (October 2009: 10.0%), alongside the current cyclical low. Gray shaded bands indicate official recessionary periods. A contextual callout explains what the current rate means for broad job security and the economy.

Data sources and refresh rate

Driven by BLS series LNS14000000. Cached for 24 hours.

Tips and caveats

- Unemployment is generally considered a lagging indicator. By the time unemployment spikes significantly, the stock market has typically already priced in an economic contraction.



SCAN - Stock screener

Command: SCAN

Category: Markets

Requires ticker: No

Overview

The Stock screener is a powerful discovery tool that allows users to filter the entire universe of US equities based on specific fundamental and technical criteria. It is the primary method for finding new investment ideas that match a particular trading strategy.

How to use it

Type SCAN to open the panel. Use the dropdown menus and input fields at the top of the panel to set your parameters. You can filter by Sector, Market cap tier (Large, Mid, Small, Micro), Price range, Average trading volume, Daily percentage change, and fundamental metrics like P/E ratio. Click the search/submit button to generate results.

Reading the output

The results are presented in a sortable table containing the matching tickers. Each row displays the current price, market capitalization, P/E ratio, sector, and daily performance.

Data sources and refresh rate

The screening engine is powered by Finviz data routing. Due to the dynamic nature of custom queries, this data is fetched on-demand and is not cached.

Tips and caveats

- Start with broad filters and gradually narrow them down. If your criteria are too restrictive (e.g., looking for a micro-cap stock with massive volume and a single-digit P/E), the screener may return zero results.

The screenshot shows the Finviz Stock Screener interface. At the top, there are navigation tabs for NVDA DES, ACLX DES, and BG DES, and a 'Stock Screener X' tab. Below the tabs, there are buttons for 'STOCK SCREENER', 'SCAN', 'CLEAR', 'CSV', and 'WL'. The interface shows 73 results. The filters are set to Sector: Basic Materials, Market Cap: Any, Avg Vol: Over 1M, Change: Any, Price: 10 - 99. The table below lists the results:

SYMBOL	COMPANY	SECTOR	PRICE	CHG% ↓	VOLUME	CAP	P/E
GPPE	Green Plains Inc	Basic Materia...	\$14.65	+0.05%	1.0M	1020000...	-
CLMT	Calumet Inc	Basic Materia...	\$28.52	+0.04%	770K	2480000...	-
CENX	Century Aluminum Co	Basic Materia...	\$52.78	+0.03%	1.9M	4930000...	133.4
CE	Celanese Corp	Basic Materia...	\$51.00	+0.03%	2.4M	5590000...	-
ECVT	Ecovyst Inc	Basic Materia...	\$11.52	+0.02%	971K	1270000...	-
DOW	Dow Inc	Basic Materia...	\$30.88	+0.01%	6.4M	2215000...	-
METC	Ramaco Resources Inc	Basic Materia...	\$15.64	+0.01%	1.1M	9954200...	-
LYB	LyondellBasell Industries NV	Basic Materia...	\$58.14	+0.00%	4.5M	1873000...	-
HUN	Huntsman Corp	Basic Materia...	\$12.18	-0.01%	3.6M	2120000...	-
CTVA	Corteva Inc	Basic Materia...	\$79.65	-0.01%	2.7M	5357000...	50.3
NTR	Nutrien Ltd	Basic Materia...	\$74.76	-0.01%	2.9M	3614000...	16.0
AA	Alcoa Corp	Basic Materia...	\$63.24	-0.01%	6.9M	1669000...	14.1
EMN	Eastman Chemical Co	Basic Materia...	\$74.13	-0.02%	962K	8460000...	18.1
CSTM	Constellation SE	Basic Materia...	\$25.65	-0.02%	1.3M	3460000...	13.3
IFF	International Flavors & Fragrances Inc	Basic Materia...	\$79.46	-0.02%	1.0M	2030000...	-
AXTA	Axalta Coating Systems Ltd	Basic Materia...	\$31.99	-0.02%	3.5M	6830000...	18.4
MP	MP Materials Corporation	Basic Materia...	\$62.49	-0.02%	5.0M	1110000...	-
FMC	FMC Corp	Basic Materia...	\$14.10	-0.02%	1.8M	1760000...	-

QSTA - AI market analysis

Command: QSTA

Category: Markets

Requires ticker: No

Overview

The AI market analysis command leverages advanced language models to synthesize a massive amount of intraday data into a cohesive, institutional-style market briefing. It saves time by reading and interpreting the tape for you.

How to use it

Type QSTA in the Command Bar. Use the three tabs at the top to select the briefing relevant to the current time of day: Pre-Open (available around 08:30 ET), Mid-Session (available around 12:00 ET), or Recap (available after the close at 16:30 ET).

Reading the output

The output is a text-based, multi-paragraph report formatted similar to notes produced by Wall Street strategy desks. The AI breaks down the macroeconomic narrative, highlights sector rotation, points out key technical levels on major indices, and summarizes the fundamental drivers behind the day's biggest movers.

Data sources and refresh rate

The analysis is generated dynamically by the DeepSeek AI model, which uses DuckDuckGo RAG (Retrieval-Augmented Generation) to pull in live, current market data prior to generating the text.

Tips and caveats

- AI analysis is a synthesis of current narratives, not a crystal ball. Use it to understand *why* the market is moving, not necessarily *where* it will go next. Generation may take a few seconds as the AI reads and processes the live data.

Top News
QST Daily Analysis X

QSTA QST DAILY ANALYSIS
AI · DeepSeek · RAG REFRESH

PRE-OPEN
MID-SESSION
RECAP

Mar 6, 2026 Mid-Session Analysis – March 06, 2026	Mid-Session Analysis – March 06, 2026 Mar 6, 2026 · 11:22 ET · 3680 tokens · deepseek-chat
Mar 5, 2026 Mid-Session Analysis – March 05, 2026	Mid-Session Market Analysis
Mar 4, 2026 Mid-Session Analysis – March 04, 2026	Session Character
Mar 3, 2026 Mid-Session Analysis – March 03, 2026	Current Index Levels & Performance:
Mar 2, 2026 Mid-Session Analysis – March 02, 2026	Nasdaq Composite: 22,543.54 (-0.90%) Dow Jones Industrial Average: 47,380.07 (-1.20%) Russell 2000: 2,530.33 (-2.14%) S&P 500: Data Not Available
Feb 27, 2026 Mid-Session Analysis – February 27, 2026	All provided major indices are in negative territory, with the Russell 2000 showing the most pronounced weakness at -2.14%. The Dow's decline of -1.20% and the Nasdaq's -0.90% drop indicate a broad-based, trending sell-off. The significant underperformance of small-caps (Russell 2000) versus large-cap tech (Nasdaq) suggests a clear risk-off character to the session. Without volume data, the price action alone points to a trending down day with distribution evident across market caps.
Feb 26, 2026 Mid-Session Analysis – February 26, 2026	Sector Rotation
Feb 25, 2026 Mid-Session Analysis – February 25, 2026	Top & Bottom Performing Sectors:

DeepSeek · DuckDuckGo RAG · Generated 08:30 / 12:00 / 16:30 ET
Auto-refresh every 30 min

2.5 Portfolio

Commands in this category manage personal watchlists.

WL - Watchlists

Command: WL

Category: Portfolio

Requires ticker: No

Overview

The Watchlists command allows users to create personalized groups of tickers for quick monitoring. Instead of remembering dozens of symbols, you can group them logically (e.g., "Tech Growth", "Dividend Payers", "EV Sector") and track their performance in a consolidated view.

How to use it

Type WL and press Enter. The panel interface allows you to create a new watchlist, rename existing ones, and add or remove ticker symbols using a simple text input field. Clicking on a ticker within your watchlist can optionally pipe that symbol into other commands (like GP or DES).

Reading the output

The selected watchlist displays a clean table of your saved symbols, showing the latest price and daily percentage change, allowing for quick scanning of your portfolio's general health.

Data sources and refresh rate

Pricing data for the symbols in your watchlist updates continuously during market hours. The watchlist structures themselves (the lists of symbols) are saved locally, or synced to the cloud if you are signed into a multi-device account.

Tips and caveats

- Keep watchlists focused. A watchlist with 50 stocks becomes difficult to monitor effectively. Break them down into specific themes or sectors.

WL - Watchlists

Command: WL

Category: Portfolio

Requires ticker: No

Overview

The Watchlists command allows users to create personalized groups of tickers for quick monitoring. Instead of remembering dozens of symbols, you can group them logically (e.g., "Tech Growth", "Dividend Payers", "EV Sector") and track their performance in a consolidated view. **Furthermore, watchlists now support the creation of Price Alerts, providing proactive, email-based notifications when a stock hits a specific price target.**

How to use it

Type WL and press Enter. The panel interface allows you to create a new watchlist, rename existing ones, and add or remove ticker symbols using a simple text input field. Clicking on a

ticker within your watchlist can optionally pipe that symbol into other commands (like GP or DES).

To set a Price Alert, locate the **bell icon** next to the price for any ticker in your watchlist. An outline bell signifies no alert is set, while a filled/colored bell indicates an active alert. Clicking this icon opens an **inline modal** where you can select the condition (\geq or \leq), enter the target price, and click "Create Alert." The panel header also features an **Alerts tab** with a badge displaying the total number of active alerts. Clicking this tab switches the panel view to the dedicated alert management dashboard.

Reading the output

The selected watchlist displays a clean table of your saved symbols, showing the latest price and daily percentage change, allowing for quick scanning of your portfolio's general health.

When viewing the dedicated Alerts tab, a table lists all your active and triggered alerts (maximum 50). Each row shows the symbol, the condition (e.g., \leq \$43.99), and a status badge (Green **Active** or Gray **Triggered**). Action buttons (Edit, Delete, Re-activate) are available for management. Clicking on a symbol in this view automatically fills the Command Bar. To return to your watchlist view, simply click on any of the watchlist tabs at the top of the panel.

Data sources and refresh rates for Symbol prices and Alerts

Pricing data for the symbols in your watchlist updates continuously during market hours. The watchlist structures themselves (the lists of symbols) are saved locally, or synced to the cloud if you are signed into a multi-device account. **Price Alerts are checked every 5 minutes during standard NYSE market hours (Mon-Fri, 9:30 AM - 4:00 PM ET) using bulk backend pricing data. The WL panel polls the server every 60 seconds to update the status of active and triggered alerts.**

Tips and caveats

- Keep watchlists focused. A watchlist with 50 stocks becomes difficult to monitor effectively. Break them down into specific themes or sectors.
- **Alerts are one-shot**: once triggered, they deactivate automatically. You must manually re-activate a triggered alert from the Alerts tab or create a new one.
- **Maximum 50 active alerts per user.**
- **Alerts only work during NYSE market hours (9:30 AM - 4:00 PM ET, Monday**

through Friday). Price movements outside these hours will not trigger alerts until the next market session.

- Only US equities are supported for alerts in this version. Crypto, metals, and energy alerts will be added in a future update.
- If you remove a ticker from all your watchlists, any active alert for that ticker remains active. Use the **Alerts tab** to manage these "orphaned" alerts.



The screenshot shows a terminal window titled 'watchlists' with a search bar and a list of ten stock tickers. Each row includes the company name, stock type, exchange, current price, and percentage change. A search bar at the top contains the text 'ticker symbol (e.g. AAPL)'. The list includes:

Company Name	Stock Type	Exchange	Price	% Change
BWX Technologies, Inc. Common Stock	Common Stock	NYSE - Industrials	199.75	-4.94%
Constellation Energy Corporation - Common Stock When-Issued	Common Stock When-Issued	NASDAQ - Utilities	281.99	-10.90%
Devon Energy Corporation Common Stock	Common Stock	NYSE - Energy	48.66	-0.27%
GE Vernova Inc. Common Stock	Common Stock	NYSE - Industrials	851.07	-3.00%
Centrus Energy Corp. Class A Common Stock	Class A Common Stock	NYSE - Energy	186.76	-8.94%
Nano Nuclear Energy Inc. - common stock	common stock	NASDAQ - Industrials	21.10	+0.43%
Oklo Inc. Class A common stock	Class A common stock	NYSE - Utilities	53.97	-1.32%
Talen Energy Corporation - Common Stock	Common Stock	NASDAQ - Utilities	302.97	-10.91%
Vistra Corp. Common Stock	Common Stock	NYSE - Utilities	146.02	-12.64%

2.6 System

Commands in this category control the terminal itself and assist with navigation and discovery.

LF - Look for

Command: LF

Category: System

Requires ticker: No (Takes a search query)

Overview

The Look for command is the primary ticker search tool. If you know a company's name but not its ticker symbol, LF bridges that gap instantly.

How to use it

Type LF followed by the company name (for example, LF palantir). The system opens an overlay modal window containing a results table.

Reading the output

The modal lists potential matches, displaying the company name alongside its official ticker symbol and exchange. You can click a row, or use the arrow keys and press Enter, to automatically fill the Command Bar with the selected ticker, priming it for your next command (e.g., GP, FA, DES).

Data sources and refresh rate

Searches the internal equities database. Results are returned instantly.

Tips and caveats

- The search is highly forgiving and handles partial matches well.

LF Look For Search for a ticker by company name or symbol

bl

SYMBOL	COMPANY NAME	EXCHANGE	SECTOR	TYPE
BL	BlackLine, Inc. - Common Stock	NASDAQ	Technology	Stock
BLBD	Blue Bird Corporation - Common Stock	NASDAQ	Industrials	Stock
BLCN	Siren NexGen Economy ETF	NASDAQ	—	ETF
BLCO	Bausch + Lomb Corporation Common Shares	NYSE	Healthcare	Stock
BLCR	iShares Large Cap Core Active ETF	NASDAQ	—	ETF
BLCV	iShares Large Cap Value Active ETF	ARCA	—	ETF
BLD	TopBuild Corp. Common Stock	NYSE	Industrials	Stock
BLDG	Cambria Global Real Estate ETF	BATS	—	ETF
BLDP	Ballard Power Systems, Inc. - Common S...	NASDAQ	Industrials	Stock
BLDR	Builders FirstSource, Inc. Common Stock	NYSE	Industrials	Stock
BLDX	Impax Global Infrastructure ETF	ARCA	—	ETF
BLES	Inspire Global Hope ETF	ARCA	—	ETF
BLFS	BioLife Solutions, Inc. - Common Stock	NASDAQ	Healthcare	Stock
BLFY	Blue Foundry Bancorp - Common Stock	NASDAQ	Financial Services	Stock
BLGR	Bluemonte Large Cap Growth ETF	ARCA	—	ETF
BLIV	BeLive Holdings - ordinary shares	NASDAQ	Technology	Stock
BLK	BlackRock, Inc. Common Stock	NYSE	Financial Services	Stock
BLKB	Blackbaud, Inc. - Common Stock	NASDAQ	Technology	Stock
BLLN	BillionToOne, Inc. - Class A common st...	NASDAQ	Healthcare	Stock
BLMN	Bloomin' Brands, Inc. - Common Stock	NASDAQ	Consumer Cyclical	Stock

↑↓ Navigate Enter Select Esc Close Click outside to close

LFD - Look for description

Command: LFD

Category: System

Requires ticker: No (Takes a search keyword)

Overview

A more advanced search tool, Look for description scans the actual business summaries of public companies. It is exceptionally useful for finding thematic plays or discovering niche companies operating in a specific industry.

How to use it

Type LFD followed by a keyword (minimum 3 characters). For example, LFD water treatment or LFD credit cards.

Reading the output

The modal returns up to 50 companies whose corporate descriptions contain your exact keyword. It displays the ticker and a text snippet of the description with the keyword highlighted. Select a row to fill the Command Bar with the relevant ticker.

Tips and caveats

- Use this for thematic investing. If a new technology becomes a market trend, LFD can help you build a basket of exposed stocks.

LFD Look For Description Search companies by description keyword

Credit Cards

SYMBOL	COMPANY NAME	EXCHANGE	SECTOR	TYPE
ALRS	Alerus Financial Corporation - Common Stock Alerus Financial Corporation operates as the bank holding ...	NASDAQ	Financial Servic...	Stock
AMTB	Amerant Bancorp Inc. Class A Common Stock Amerant Bancorp Inc. operates as the bank holding company ...	NYSE	Financial Servic...	Stock
ATLC	Atlanticus Holdings Corporation - Common Stock Atlanticus Holdings Corporation, a financial technology co...	NASDAQ	Financial Servic...	Stock
ATLCP	Atlanticus Holdings Corporation - 7.625% Series B Cumulative Perpetual Preferred Stock, no par value per share Atlanticus Holdings Corporation, a financial technology co...	NASDAQ	Financial Servic...	Stock
AUB	Atlantic Union Bankshares Corporation Common Stock Atlantic Union Bankshares Corporation operates as the bank...	NYSE	Financial Servic...	Stock
AVAL	Grupo Aval Acciones y Valores S.A. ADR (Each representing 20 preferred shares) Grupo Aval Acciones y Valores S.A. provides a range of fin...	NYSE	Financial Servic...	Stock
AVBH	Avidbank Holdings, Inc. - Common Stock Avidbank Holdings, Inc. operates as a bank holding company...	NASDAQ	Financial Servic...	Stock
BBAR	Banco BBVA Argentina S.A. ADS Banco BBVA Argentina S.A. provides various banking product...	NYSE	Financial Servic...	Stock
BBD	Banco Bradesco Sa American Depositary Shares Banco Bradesco S.A., together with its subsidiaries, provi...	NYSE	Financial Servic...	Stock
BBDO	Banco Bradesco Sa American Depositary Shares (each representing one Common Share) Banco Bradesco S.A., together with its subsidiaries, provi...	NYSE	Financial Servic...	Stock
BCH	Banco De Chile ADS Banco de Chile, together with its subsidiaries, operates a...	NYSE	Financial Servic...	Stock
BCS	Barclays PLC Common Stock Barclays PLC provides various financial services in the Un...	NYSE	Financial Servic...	Stock
BFC	Bank First Corporation - Common Stock Bank First Corporation operates as a holding company for B...	NASDAQ	Financial Servic...	Stock
BFST	Business First Bancshares, Inc. - Common Stock	NASDAQ	Financial Servic...	Stock

↑↓ Navigate Enter Select Esc Close Click outside to close

LFE - Look for executive

Command: LFE

Category: System

Requires ticker: No (Takes a name query)

Overview

The Look for executive command searches the management databases. It is useful for tracking high-profile CEOs or CFOs who may manage multiple entities, sit on various boards, or have recently changed companies.

How to use it

Type LFE followed by an executive's name (minimum 3 characters). For example, LFE jensen.

Reading the output

Returns up to 50 results showing the executive's name and official title alongside the company they are associated with.

Tips and caveats

- Ensure correct spelling of the executive's name for best results.



ANA - Investment analysis

Command: ANA

Category: Fundamentals

Requires ticker: Yes

Overview

The Investment analysis command (ANA) executes a comprehensive, automated investment research pipeline inspired by the principles of value investing, notably Benjamin Graham's "The Intelligent Investor." This function runs a 6-phase evaluation to quickly assess the quality,

valuation, and market sentiment of a stock. The phases include a detailed fundamental quality check, competitor mapping, relative valuation comparison, momentum and sentiment analysis, AI synthesis via the DeepSeek model, and a computed entry price range. The goal of ANA is to consolidate a full, multi-faceted investment picture into a single, vertical scroll view, eliminating the need for the user to manually execute and cross-reference multiple terminal commands (FA, RV, INS, CN).

How to use it

To run the analysis, type a US equity ticker symbol followed by ANA (for example, `AAPL ANA`). The resulting panel presents the complete 6-phase report in a single, continuous vertical scroll view, with all analytical components displayed immediately upon generation. The process may take a moment on the first execution.

Reading the output

The ANA output is divided into seven sequential sections:

- **Quality Assessment:** A display of key fundamental metrics using color-coded cards for quick interpretation: Debt/Equity ratio, Return on Equity (ROE), Gross Margin, Earnings Per Share (EPS) Growth (3-year CAGR), and Dividend Yield. A prominent red **HIGH RISK** banner is generated at the top of the section if the Debt/Equity ratio exceeds 3.0 and the Return on Equity is below 5%.
- **Top Competitors:** A simple table listing the five largest peers by market capitalization. The table displays the peer's ticker, current price, daily percentage change, and total market capitalization.
- **Relative Valuation:** Compares the target stock's trailing 12-month Price-to-Earnings (P/E) ratio against the calculated sector median P/E. It shows the resulting percentage discount or premium and applies a corresponding evaluation badge (UNDERVALUED, SLIGHT DISCOUNT, FAIR VALUE, SLIGHT PREMIUM, OVERVALUED). A similar comparison is provided for the Price-to-Book (P/B) multiple.
- **Momentum & Sentiment:** A visual bar representing the stock's 52-week price range, marked with a white vertical line to show the current price's position (0% being the 52-week low, 100% being the 52-week high). This section also details the technical potential percentage move required to reach the 52-week high, and summarizes insider buying activity (any open market buy transactions over \$100,000 in the last three months).
- **Headlines:** A curated feed of recent news, with each headline tagged to indicate the source relevance: `[MACRO]` for general economic news impacting the broader market, `[TICKER]` for specific news articles related to the analyzed company from Finnhub, and `[PEER]` for news on the main identified competitor.
- **AI Investment Analysis:** A comprehensive, multi-paragraph report generated in Markdown by the DeepSeek AI model. The report includes an Executive Summary, a detailed Quality Assessment, a Valuation Verdict, an analysis of Momentum &

Sentiment, a list of Key Risk Factors, and a final **Investment Conclusion** (rated as BUY / HOLD / AVOID) paired with a suggested entry price range.

- **Entry Price Range:** A mechanical calculation of suggested short-term support and resistance levels. Support is calculated as the latest price multiplied by 0.95 (if the stock is undervalued) or 0.90 (if overvalued). Resistance is calculated as the 52-week high multiplied by 1.05 (if the stock exhibits strong positive momentum) or simply the 52-week high otherwise.

Data sources and refresh rate

The ANA command draws data from multiple integrated services: Core fundamental metrics are sourced from standardized SEC filings stored in QSTMarkets' internal MariaDB. Peer and competitor data is primarily pulled from the Finnhub API with a Financial Modeling Prep (FMP) fallback. Relative valuation data comes from the internal RV calculation service. Current price and 52-week range market data are sourced from the internal database (latest closing prices). Insider trades are fetched via [finvizfinance](#). News headlines are aggregated from the Finnhub API and the pre-cached **TOP** news feed. The final text-based synthesis is generated by the DeepSeek AI model ([deepseek-chat](#) with a low temperature of 0.3 for deterministic results). The entire report is computationally intensive. Results are aggressively cached in Redis for 1 hour; therefore, the first request for any ticker will take 1-2 minutes for complete generation, while subsequent requests for the same ticker within the hour will be instant.

Tips and caveats

- The ANA analysis is strictly designed for **US equities** (stocks) and does not support analysis for Crypto, Precious Metals, or Energy Commodities due to the lack of required financial statements.
- The AI conclusion (BUY/HOLD/AVOID) and all generated text are based strictly on the current market data and narrative synthesis. This output does **not constitute financial advice** and should be used only as a starting point for independent research.
- The Quality Assessment metrics rely entirely on the availability of recent annual financial reports. Companies with missing, incomplete, or very new filings may display fewer color-coded cards.
- The accuracy of the competitor and peer data is contingent upon the stock's sector. For highly specialized or obscure small-cap stocks, the algorithmically selected peer list may be less relevant to the company's core business model.
- The Entry Price Range is a mechanical, rule-based calculation. It is provided solely as a reference point to aid in trading decisions, not as a guaranteed price prediction or target.

ANA BWXT BWX Technologies, Inc. Common Stock Industrials / Aerospace & Defense

QUALITY ASSESSMENT

DEBT / EQUITY 1.64x DANGER	ROE 7.5% WARNING	DIV. YIELD 0.49% GOOD
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TOP COMPETITORS

SYMBOL	NAME	PRICE	CHG %	MKT CAP
GE	GE Aerospace Common Stock	\$289.07	-3.81%	\$304.9B
FTAI	FTAI Aviation Ltd. - Common Stock	\$232.66	-2.60%	\$23.9B
WWD	Woodward, Inc. - Common Stock	\$365.38	-1.85%	\$21.9B
ATI	ATI Inc. Common Stock	\$145.67	-2.56%	\$19.9B
CRS	Carpenter Technology Corporation Common Stock	\$376.49	-2.46%	\$18.8B

RELATIVE VALUATION

Target P/E: **204.9**
Sector Median P/E: **32.2**
vs. Median: **+537.0%** OVERVALUED
P/B: **15.5 (median: 5.1)**

Based on 7 sector peers

MOMENTUM & SENTIMENT

52W Low: \$84.21 Current: \$208.98 (92%) 52W High: \$220.57

Technical potential to 52W high: **+5.5%**
Insider activity: No significant insider buys (>\$100k)

HEADLINES

[MACRO] FDA approves higher dose version of weight loss drug Wegovy as Novo Nordisk tries to win back market share
[MACRO] Trump signals DOJ should continue Powell probe, complicating Warsh Fed nom
[MACRO] The market remains heavily oversold, so we're snapping up more of 2 stocks
[TICKER] Best Momentum Stocks to Buy for March 18th
[TICKER] New Strong Buy Stocks for March 18th
[PEER] These S&P500 stocks are moving in today's session
[PEER] These S&P500 stocks are gapping in today's session

AI INVESTMENT ANALYSIS

Investment Analysis: BWXT (Industrials - Aerospace & Defense)

1. Executive Summary

BWXT presents a high-risk profile characterized by excessive leverage and a premium valuation that is fundamentally disconnected from sector norms. While operating in the stable Aerospace & Defense sector, its financial quality is poor, and its stock price is trading near its 52-week high, suggesting limited near-term upside. A value investor should avoid this stock at its current price.

DeepSeek deepseek-chat / 1638 Tokens 3/19/2026, 1:55:20 PM ET

MACRO - Global Macro Dashboard

Command: MACRO

Category: Markets

Requires ticker: No

Overview

The Global Macro Dashboard (MACRO) is a powerful, single-panel solution for monitoring global cross-asset performance and obtaining synthesized, high-level strategic analysis. It combines a live-updating price grid for major indices, commodities, crypto, and rates with an institutional-style AI-generated macro report. This tool is designed to provide traders and analysts with a concise, top-down view of the global financial ecosystem at a glance, allowing for quick assessment of market sentiment and key directional themes.

How to use it

To open the panel, simply type MACRO in the Command Bar and press Enter. The price grid will load quickly with the latest market data. The AI report section will populate shortly thereafter. Because the report is computationally intensive on its initial load, subsequent executions within the 6-hour cache window will be nearly instant, providing a seamless user experience.

Reading the output

The panel is structured into two main, vertically-scrolling sections. The **Price Grid** at the top displays 14 tiles organized by asset class (Energy, Metals, Crypto, Indices, Rates). Each tile provides the asset name, its current price, and the daily percentage change, with a color-coded border (green for positive change, red for negative) for immediate visual confirmation of performance. Below the price grid is the **Macro Strategic Report**. This is a detailed, multi-paragraph analysis acting as an executive briefing. It is structured into clear headings such as Executive Summary, Key Macro Themes, Cross-Asset View, and Risk Radar. The report synthesizes live price movements and global news to articulate the prevailing market narrative. Sources for the news articles used by the AI are provided at the bottom with clickable links, along with a footer detailing the model, token count, and cache status for transparency.

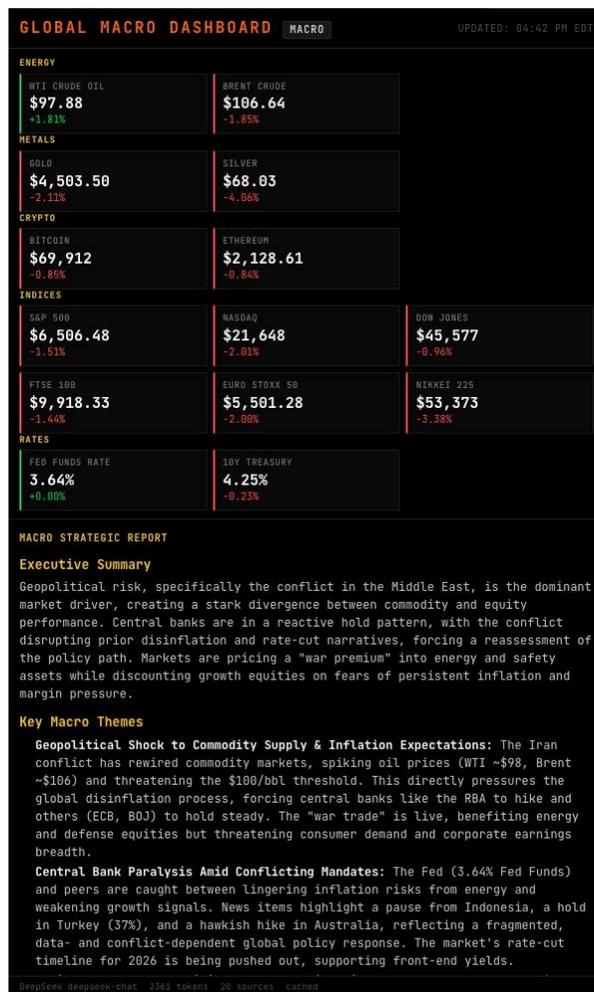
Data sources and refresh rate

The price grid aggregates data from multiple sources: yfinance for Equities, Indices, Metals, and Energy; CCXT Binance for Cryptocurrencies; and the FRED API for key US rates. These prices are polled and auto-refresh every 60 seconds. The Macro Strategic Report is generated by the DeepSeek AI model using a Retrieval-Augmented Generation (RAG) pipeline fed by DuckDuckGo news queries and the live price context. To manage system load, the report is aggressively cached for 6 hours, meaning the text analysis reflects the macro conditions at the time of its generation. The system is engineered with graceful degradation: price data remains

active even if the AI model fails, and vice versa.

Tips and caveats

- The AI report is generated only every 6 hours. While the price grid updates every 60 seconds, significant intraday news or data releases will not be reflected in the report's textual analysis until the next generation cycle.
- Price data refreshes every 60 seconds but is based on periodic polling, not real-time streaming via WebSocket.
- International indices (FTSE, Euro Stoxx, Nikkei) will display their final closing price outside of their respective market hours.
- Use the MACRO command in conjunction with **ECO** (for a dedicated US macro dashboard) and **ECOCAL** (for upcoming scheduled data releases) to build a complete picture of the global economic landscape.



CAL - Earnings & Dividends Calendar

Command: CAL

Category: Markets

Requires ticker: No

Overview

The Earnings & Dividends Calendar command (CAL) is a crucial pre-trading tool that provides a market-wide overview of all major corporate actions. It consolidates upcoming earnings releases and ex-dividend dates into a single panel, allowing traders and investors to proactively identify catalysts for single-stock volatility and plan for dividend capture strategies. The panel is a singleton view that efficiently tracks hundreds of relevant events across US-listed equities.

How to use it

Type CAL in the command bar and press Enter. The panel opens immediately with the **Earnings tab** selected and the **WEEK** range active by default. Use the **TODAY/WEEK** toggle in the header to switch between viewing only today's scheduled events or the full trading week ahead. You can switch to the **Dividends tab** using the tab selector in the panel header. To initiate deeper research, click on any ticker symbol in the table; this action automatically fills the CommandBar, priming it for a follow-up command such as GP for a price chart, DES for the company profile, or EE for historical earnings.

Reading the output

The **Earnings tab** is designed to provide immediate clarity on a high volume of events. Events are sorted chronologically, first by date (ascending), then by reporting timing (Before Market Open, then After Market Close), and finally alphabetically by symbol. The **BMO badge** (blue) indicates the company reports before the market opens (typically 7:00-9:00 AM ET), while the **AMC badge** (orange) indicates reporting after the close (typically 4:00-5:00 PM ET). The EPS Actual column initially displays "--"; this field is automatically populated with the actual figure once the company officially reports, allowing for a quick comparison against the EPS Estimated consensus.

The **Dividends** tab focuses on key dates for income investors. The table is sorted primarily by Ex-Date (ascending), followed by the Symbol. The **Ex-Date** is the critical cutoff date: investors must own the stock before this date to qualify for the declared dividend payout. The **Payment date** is the date on which the cash dividend is actually deposited into shareholder accounts. The panel header dynamically updates to display the total event count (e.g., "374 events") for the currently active tab and selected time range.

Data sources and refresh rate

Earnings calendar data is sourced from Finnhub, which provides real-time updates for calendar events. Dividend data is populated from the internal MariaDB database, which utilizes an Extract, Transform, Load (ETL) pipeline powered by Financial Modeling Prep (FMP). To ensure API compliance and manage system load, both datasets are aggressively cached server-side for 2 hours. On weekends, the WEEK range toggle is intelligently adjusted to display the following Monday-Friday, ensuring the calendar always shows relevant upcoming events.

Tips and caveats

- Use CAL at the start of each trading week to identify which major companies report earnings. Earnings reports are the single largest source of single-stock volatility.
- The BMO/AMC timing badge helps plan trades: BMO reporters may gap at the open, while AMC reporters affect the next day's open.
- Click any symbol to quickly open its chart (GP), description (DES), or historical earnings (EE) for context before the report.
- The Dividends tab depends on ETL-populated data. Very recently announced dividends may not appear until the next ETL cycle runs.
- On weekends and holidays, TODAY will show zero events (no market activity). Use WEEK to see the upcoming week's calendar.
- Some micro-cap or OTC tickers in the earnings calendar may not have full data available in other QSTMarkets commands (GP, DES) due to limited coverage from data providers.
- CAL complements the ECOCAL command (which covers macroeconomic events like FOMC, CPI, Jobs reports). Together they provide a complete view of all market-moving events for the week.

NVDA CN		MSFT CN		Earnings & Dividends Calendar X			
EARNINGS & DIVIDENDS				CAL	TODAY	WEEK	374 events
EARNINGS			DIVIDENDS				
DATE	SYMBOL	COMPANY	TIME	EPS EST	EPS ACT		
Mar 23	ADTX	Aditxt, Inc. - Common Stock	BMO	--	--		
Mar 23	ATAT	Atour Lifestyle Holdings Limited	BMO	\$3.21	--		
Mar 23	CMCL	Caledonia Mining Corporation Plc	BMO	\$0.60	--		
Mar 23	HUIZ	Huize Holding Limited - American	BMO	--	--		
Mar 23	MKC	McCormick & Company, Incorporated	BMO	\$0.61	--		
Mar 23	MOB	Mobilicom Limited - Ordinary Shar	BMO	-\$0.00	--		
Mar 23	SY	So-Young International Inc. - Ame	BMO	-\$0.70	--		
Mar 23	VIOT	Viomi Technology Co., Ltd - Ameri	BMO	--	--		
Mar 23	AACG	ATA Creativity Global - American	AMC	--	--		
Mar 23	ADAG	Adagene Inc. - ADS, each represen	AMC	-\$0.19	--		
Mar 23	APRE	Aprea Therapeutics, Inc. - Common	AMC	-\$0.40	--		
Mar 23	ATOS	Atossa Therapeutics, Inc. - Commo	AMC	-\$1.16	--		
Mar 23	BNR	Burning Rock Biotech Limited - Am	AMC	--	--		
Mar 23	CNTA	Centessa Pharmaceuticals plc - Am	AMC	-\$0.39	--		
Mar 23	CYPH	Cypherpunk Technologies Inc. - Co	AMC	-\$0.20	--		
Mar 23	DFLI	Dragonfly Energy Holdings Corp -	AMC	-\$0.61	--		
Mar 23	HSDT	Solana Company - Class A Common S	AMC	-\$27.03	--		
Mar 23	ICMB	Investcorp Credit Management BDC,	AMC	\$0.11	--		

FACTOR - Factor Exposure

Command: FACTOR

Category: Portfolio

Requires ticker: No (Takes an optional watchlist name)

Overview

The Factor Exposure command (FACTOR) provides a quantitative analysis of your portfolio's sensitivity to five dominant market risk factors, a critical step in advanced portfolio management. Using a methodology inspired by classic investment theory, it measures how much of your portfolio's returns can be explained by movements in **Market**, **Value**, **Growth**, **Small Cap**, and **Momentum** styles. By identifying your actual factor biases, you can better understand your portfolio's risk profile and the drivers of its performance, regardless of individual stock performance.

How to use it

You can invoke the command in two ways:

1. Type **FACTOR** in the Command Bar and press Enter. The panel will open, displaying a dropdown menu where you can select one of your saved watchlists. After selection, click the **Analyze** button to execute the calculation.
2. Type **FACTOR** followed by the name of your saved watchlist (e.g., **FACTOR NUCLEAR**). The panel will open and automatically run the analysis on the specified watchlist.

Note: You must be logged into your account to access your saved watchlists. The selected watchlist must contain at least two equity tickers with sufficient historical data for a meaningful calculation.

Reading the output

The output is segmented into three primary sections:

1. **Horizontal Bar Chart:** A visual summary displaying the calculated **Beta** for the five factors, sorted from highest to lowest. A larger bar indicates a higher sensitivity (beta) to that particular factor. The name of the analyzed watchlist is prominently displayed above the chart, along with the lookback window used for the calculation.
2. **Factor Data Table:** A detailed table providing the precise quantitative metrics for each factor:
 - **FACTOR:** The name and ETF proxy used for the factor (e.g., Market (SPY)).
 - **BETA:** The regression coefficient, representing the portfolio's sensitivity to the factor. A Beta of 1.0 means the portfolio moves in sync with the factor; a Beta > 1.0 means it is more sensitive/volatile; and a Beta < 0 indicates an inverse relationship.
 - **R-squared:** The coefficient of determination (range 0.00 to 1.00). This indicates the percentage of your portfolio's variance that is explained by the factor.

- **P-VALUE:** The statistical significance of the Beta coefficient. A value below 0.05 is generally considered statistically significant.
 - **SIG.:** A quick visual indicator of statistical significance: *** ($p < 0.001$), ** ($p < 0.01$), * ($p < 0.05$), and - (not significant).
3. **Interpretation:** An auto-generated text block (with an orange left border) that summarizes the findings. It identifies the two most dominant factors (those with the highest Beta), comments on the portfolio's style bias (e.g., Growth-oriented or Value-tilted), assesses the portfolio's market sensitivity compared to the S&P 500, and flags any factors that are not statistically significant.
 4. **Footer:** Provides transparency by showing the number of symbols analyzed, the weighting methodology (**Equal-Weighted**), and the date and time of the calculation.

Data sources and refresh rate

The calculation uses daily historical closing prices for the past 252 trading days (approximately one year) for both the watchlist symbols and the five factor ETFs (SPY, IVE, IWF, IWM, MTUM). Historical price data is sourced from QSTMarkets' internal MariaDB database, with an automatic fallback to [yfinance](#) for any missing data. Since factor exposure changes slowly, the computationally intensive report is cached using Redis for **6 hours**.

Tips and caveats

- The command performs best with watchlists containing between 5 and 50 diversified tickers. Results from very small portfolios (2-3 tickers) may lack statistical significance.
- The analysis uses **equal-weighting**, meaning every ticker in the watchlist contributes equally to the portfolio return, regardless of its actual market capitalization or your invested dollar amount.
- The factors are calculated independently using simple (univariate) linear regression. This avoids complex multicollinearity issues but means that the individual Betas are not directly comparable to those derived from a full multi-factor model (like Fama-French).
- A Market Beta (SPY) greater than 1.0 suggests the portfolio is more volatile than the general market, while a Beta less than 1.0 suggests lower volatility.
- Use this command in conjunction with the **SCAN** (Stock Screener) command to build targeted watchlists and then quantitatively verify your intended factor exposure with FACTOR.



CORR - Correlation Matrix

Command: CORR

Category: Portfolio

Requires ticker: No (Acepta nombre opcional de *watchlist* como argumento)

Overview

El comando **Correlation Matrix (CORR)** calcula y visualiza la matriz de correlación de Pearson entre todos los pares de activos contenidos en una *watchlist* seleccionada, utilizando retornos diarios sobre un periodo configurable. Esta herramienta es fundamental para la gestión avanzada de carteras, ya que permite al usuario identificar pares de activos que se mueven juntos (alta correlación positiva), en direcciones opuestas (correlación negativa) o de forma independiente (baja correlación). Es el paso esencial para evaluar y mejorar la diversificación de un portfolio.

How to use it

El comando puede invocarse de dos maneras:

1. Escriba **CORR** en la Command Bar y presione Enter. El panel se abrirá, mostrando un menú desplegable para seleccionar una de sus *watchlists* guardadas, un selector de periodo (por defecto 6 meses) y un botón **Analyze**. El usuario debe elegir la *watchlist* y el periodo deseado antes de hacer clic en **Analyze**.
2. Escriba **CORR** seguido del nombre de su *watchlist* guardada (por ejemplo, **CORR NUCLEAR**). El panel se abrirá y ejecutará el análisis automáticamente sobre esa *watchlist* con el periodo predeterminado de 6 meses.

Nota: Debe estar autenticado (haber iniciado sesión) para acceder a sus watchlists guardadas. La watchlist seleccionada debe contener al menos dos tickers de renta variable con datos históricos suficientes para realizar un cálculo significativo.

Periodos disponibles: 1M (1 mes), 3M (3 meses), 6M (6 meses, por defecto), 1Y (1 año). Puede cambiar el periodo en el selector del panel y volver a pulsar **Analyze** sin necesidad de reescribir el comando.

Reading the output

El panel de salida se divide en cuatro secciones clave:

1. **Heatmap (Matriz de Correlación):** Una cuadrícula visual de NxN celdas (donde N es el número de *tickers*). Cada celda representa el coeficiente de correlación entre dos activos. La escala de color facilita la interpretación inmediata: el **rojo intenso** indica una fuerte correlación negativa (cercana a -1), el **amarillo** indica una correlación cercana a cero (movimiento independiente), y el **verde intenso** indica una fuerte correlación positiva (cercana a +1). Para *watchlists* de hasta 15 *tickers*, el valor numérico de correlación se muestra directamente en cada celda. Para listas más grandes, los valores se muestran al pasar el cursor (tooltip). La diagonal siempre muestra 1.00. El nombre de la *watchlist* analizada aparece en amarillo sobre la matriz.
2. **Most Correlated Pairs (Pares Más Correlacionados):** Una tabla en el lado izquierdo que lista los 5 pares de activos con mayor correlación positiva, ordenados de mayor a menor. Estos pares, mostrados en verde, indican activos que ofrecen un beneficio de diversificación limitado, sugiriendo solapamiento o concentración en la cartera.
3. **Least Correlated Pairs (Pares Menos Correlacionados):** Una tabla en el lado derecho que muestra los 5 pares con menor correlación, ordenados de menor a mayor. Los valores se muestran en rojo (negativos) o amarillo (bajos positivos). Estos pares

representan las mejores oportunidades para diversificación o estrategias de cobertura (*hedging*).

4. **Interpretation:** Un bloque de texto autogenerado con un borde naranja que resume los hallazgos. Identifica el par más y menos correlacionado, cuenta cuántos pares tienen una correlación extremadamente alta ($|r| > 0.8$) y evalúa el nivel general de diversificación del portfolio. Si se detectan demasiados pares altamente correlacionados, se emite una advertencia sobre el riesgo de concentración.

|--|

Data sources and refresh rate

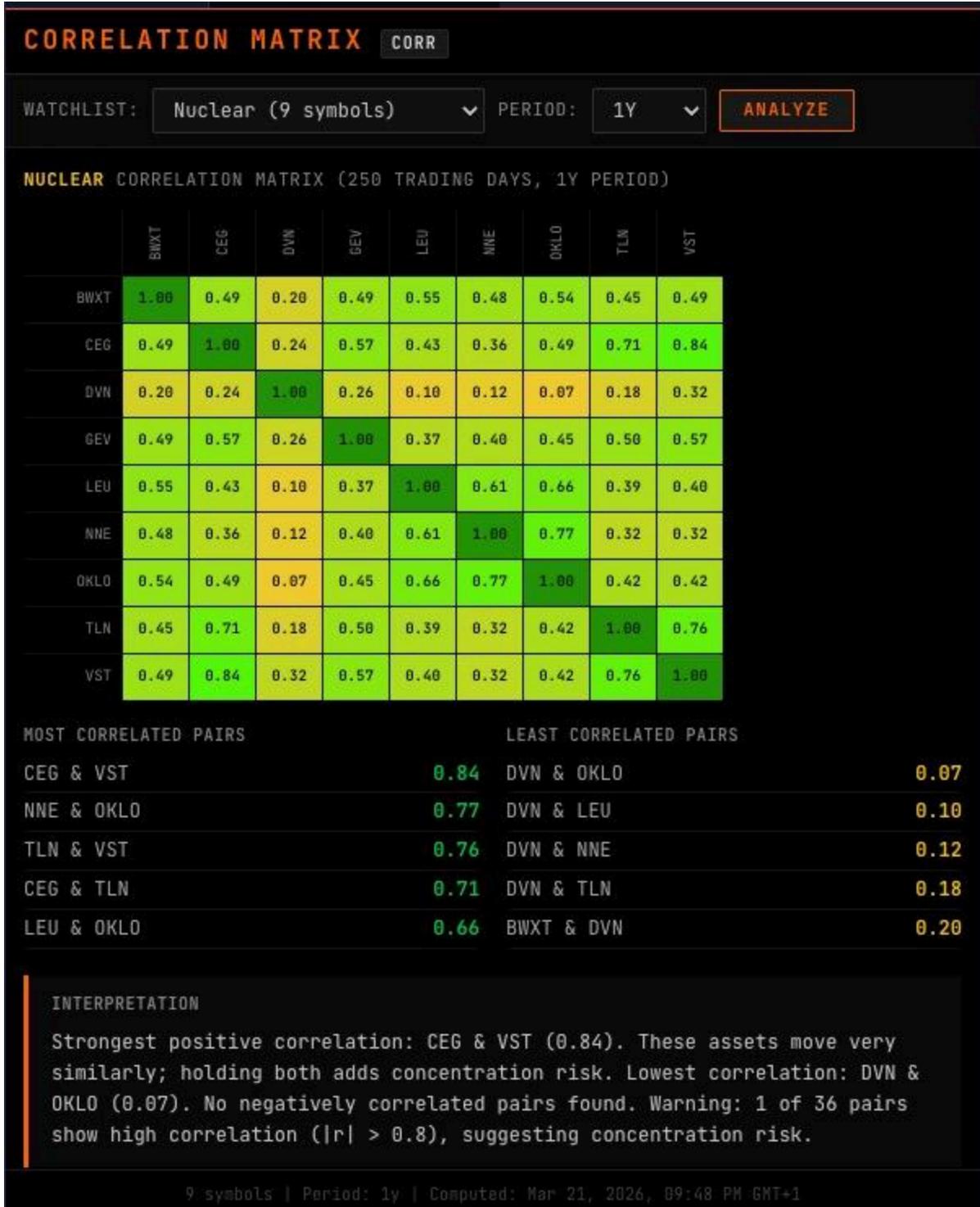
El cálculo utiliza precios de cierre diarios históricos para el periodo seleccionado, obtenidos de la base de datos interna MariaDB de QSTMarkets (que mantiene hasta 10 años de historial). Existe un mecanismo de *fallback* automático a **yfinance** para cualquier símbolo cuyos datos no estén disponibles en la base de datos principal. Los símbolos sin datos suficientes para el periodo seleccionado se excluyen automáticamente del análisis.

Dado que el cálculo es intensivo, el informe completo se almacena en caché de forma agresiva en Redis durante **6 horas** para optimizar el rendimiento y gestionar la carga del sistema.

Límite de símbolos: El análisis está limitado a un máximo de 30 *tickers* por *watchlist* para mantener la legibilidad del *heatmap*. Si la *watchlist* contiene más de 30 símbolos, solo se analizarán los primeros 30, y se mostrará un aviso en la sección de Interpretación.

Tips and caveats

- La correlación es una medida de co-movimiento **histórico**, no de causalidad. Dos activos altamente correlacionados en el pasado pueden divergir en el futuro.
- Una correlación alta (> 0.8) entre dos activos sugiere que mantener ambos en una cartera proporciona beneficios de diversificación limitados.
- Una correlación negativa es muy deseable para la **cobertura** (*hedging*): indica que cuando un activo cae, el otro tiende a subir, suavizando la volatilidad general de la cartera.
- Para periodos de tiempo muy cortos (como 1 mes), la matriz de correlación puede tener una menor significancia estadística y reflejar ruido temporal. Se recomienda utilizar los periodos de **6 meses** o **1 año** para obtener resultados más robustos y representativos.
- Utilice **CORR** en conjunto con el comando **FACTOR** (Factor Exposure) para un análisis de cartera más completo: FACTOR revela la exposición a estilos de inversión, mientras que CORR se centra en la interdependencia entre los activos individuales de la *watchlist*.
- Puede usar **CORR** y **SCAN** (Stock Screener) para mejorar la diversificación: use SCAN para buscar activos que tengan baja correlación respecto a los que ya posee, y luego agréguelos a una *watchlist* para verificar cuantitativamente el efecto en la matriz de correlación.



NOTES - Investment notes per ticker

Command: NOTES

Category: Portfolio

Requires ticker: No (Supports both **NOTES** alone and **TICKER NOTES**)

Overview

The Investment notes per ticker command (**NOTES**) provides a centralized, private repository for users to save personal investment research, thesis statements, links, and quick observations about any supported asset. Notes are securely stored in the cloud, specific to your user account, and synced across all your terminal sessions, centralizing the qualitative research often scattered across notebooks and documents. Furthermore, **NOTES** integrates deeply across the terminal, placing a visible indicator next to tickers with saved notes in multiple other commands (e.g., **WL**, **SCAN**, **RV**), allowing for research retrieval at the point of action.

How to use it

You can access the notes editor in two primary ways:

1. **Type **NOTES**** in the Command Bar and press Enter. This opens the panel in browse mode, displaying a list of all your saved notes in the left sidebar.
2. **Type a ticker symbol followed by **NOTES**** (for example, **AAPL NOTES**). This opens the panel and automatically loads the note for that specific ticker into the editor pane, or prepares a new note for creation if none exists.

The panel is a *singleton*: if you open a note for one ticker and then immediately open a note for another, the existing **NOTES** panel will simply switch the content, preventing duplicate panels. Use the text input at the top of the left sidebar to start a new note for any symbol not yet listed.

Reading the output

The panel is divided into two parts:

- **Left Sidebar (30%)**: Displays a scrollable list of all tickers for which you have saved a note. Each entry shows the ticker symbol, the last updated date, and a 100-character preview of the note's content. Double-clicking any ticker in this list will automatically load its content and also populate the Command Bar with the ticker symbol, ready for a follow-up command (e.g., **FA**).
- **Right Pane (70%)**: Contains a plain text editor where you write and edit your note (up to 10,000 characters). Below the editor are the **Save** and **Delete** buttons. A character counter tracks your progress. An asterisk (*) will appear in the panel header if you have unsaved changes (a "dirty state"). If you attempt to switch tickers or close the panel with unsaved changes, a confirmation dialog will appear.

Integration across the Terminal

Once a note is saved for a ticker, a small **note icon** (memo emoji) appears next to that ticker symbol in the following key panels, providing immediate access to your research:

- **WL** (Watchlists)
- **TOPGL** (Top Movers)
- **SCAN** (Stock Screener results)
- **RV** (Relative Valuation peer table)
- **INSB/INSS** (Insider Feeds)
- **UPDN** (Analyst Ratings)

Clicking this note icon in any of the above panels will instantly open the **NOTES** panel with the associated ticker pre-selected.

Furthermore, when viewing the **DES** (Description) panel for a ticker with a saved note, a **NOTE** badge appears in the header, and the full note content is displayed in a dedicated card at the bottom of the **DES** panel with an "Edit in NOTES panel" button.

Data sources and refresh rate

The data source for the **NOTES** command is entirely **user-generated content** stored privately in the QSTMarkets internal MariaDB database. **No external API** is involved.

Notes are loaded on-demand when the panel opens or when a ticker is selected. The system that tracks which tickers have notes (and displays the icons across other commands) is updated immediately via a custom event every time a note is saved or deleted, ensuring the visual indicators are always current.

Tips and caveats

- **Authentication is required.** You must be logged into your QSTMarkets account to create, read, update, or delete notes, as they are a user-specific private feature.
- The note indicator icons (memo emoji) only appear when you are logged in.
- Notes are restricted to **plain text**. The editor does not support rich text, Markdown, or HTML formatting.
- A firm **10,000 character limit** is enforced.
- Only valid ticker symbols that exist in the QSTMarkets database (active US equities, supported crypto, metals, and energy symbols) can have notes associated with them.
- The **NOTES** panel is a singleton; it reuses the same window instead of spawning duplicates. This is intentional to keep the workspace clean.

- Double-clicking a ticker in the sidebar is the fastest way to pipe that ticker into the CommandBar for follow-up research (e.g., GP, FA).

MSFT CN	Investment Notes X	SNPS ANA	Insider Buys	WULF AN v 2
NOTES Investment Notes				
TICKERS WITH NOTES		WULF		
Type ticker + Enter +		Edit your investment note		
WULF Mar 22, 2026 DANGER !!! Investment Conclusion: AVOID - This company fails the mos...		DANGER !!! Investment Conclusion AVOID - This company fails the most basic quality screens for value investors.		
SNPS Mar 22, 2026 Investment Conclusion: AVOID The dangerously low ROE fundamentally...		Rationale: Benjamin Graham emphasized margin of safety, which requires both quantitative cheapness and qualitative soundness. WULF exhibits neither:		
ADSK Mar 22, 2026 Investment Conclusion: HOLD Rationale: While ADSK exhibits...		Quality: Fails on debt, profitability, and earnings consistency Valuation: Cannot determine if cheap due to insufficient data		
INTC Mar 22, 2026 Investment Conclusion: AVOID Rationale: While debt levels are...		Safety: Extreme financial risk makes any margin of safety calculation impossible		
SMCX Mar 22, 2026 es un ETF no muy claro en qué está enfocado		Suggested Entry Range: N/A - No prudent entry price exists given the fundamental risks. Value investors should avoid entirely.		
CSTE Mar 22, 2026 chicharro gordo, evitar		If Forced to Specify (Theoretical):		
DD Mar 22, 2026 Investment Conclusion: AVOID Rationale: The principles of value...		Support: \$13.70 (current \$15.10 × 0.90, reflecting overvaluation risk) Resistance: \$18.51 (52-week high, as sentiment		
NKE Mar 22, 2026 Investment Conclusion: BUY Action: Accumulate on weakness. The...		Save Delete 1062 / 10.000		
EQT Mar 22, 2026 Investment Conclusion: HOLD		Editing: WULF		
11 notes total				

PERF - Portfolio Performance & Attribution

Command: PERF

Category: Portfolio

Requires ticker: No (accepts optional watchlist name, e.g. PERF NUCLEAR)

Overview

The Portfolio Performance & Attribution command (PERF) provides a rigorous, quantitative evaluation of a user's actively managed watchlist, measuring its performance and risk characteristics against a selected market benchmark (default: S&P 500 ETF, SPY). It assesses whether active stock selection has generated *alpha* (outperformance) relative to a passive strategy. The panel synthesizes key risk/return metrics, visualizes cumulative returns, and breaks down the total performance by individual ticker and by sector, helping the user understand the underlying drivers of their portfolio's results.

How to use it

The command can be invoked in two primary ways:

1. **Type PERF** in the Command Bar and press Enter. This opens the panel with a dropdown selector for your watchlists, allowing you to select a period and benchmark before clicking the **Analyze** button.
2. **Type PERF followed by a watchlist name** (e.g. PERF NUCLEAR). This opens the panel with the specified watchlist pre-selected and automatically triggers the analysis using the default settings (1-year period, SPY benchmark).

The controls bar at the top of the panel is interactive and includes: a watchlist dropdown selector, period buttons (**1M, 3M, 6M, 1Y, 2Y, 5Y**), an editable benchmark ticker field (default: **SPY**, which can be changed to any valid ticker like **QQQ** or **IWM**), the **Analyze** button, and an **Export CSV** button for offline data analysis. Changing the selected period or benchmark requires clicking **Analyze** again to recompute the data. The computation may take 5-10 seconds on the initial load for large watchlists (20+ tickers) or long periods (5Y). Subsequent requests for the same parameters within the 6-hour cache window will be instant.

Reading the output

The PERF output is logically divided into four vertically-scrolling sections:

1. **Cumulative Return Chart:** An interactive line chart displaying two series: the portfolio (orange line) and the benchmark (cyan line). Both series are normalized to a base value of 100 at the start of the selected period. If the portfolio line is consistently above the benchmark, it indicates outperformance; if below, it signals underperformance. A tooltip appears on hover, displaying the exact price index value at that point in time.
2. **Key Statistics:** A comparison table featuring six key risk/return metrics for both the Portfolio and the Benchmark columns. Metrics include **Total Return** (percentage gain/loss over the period), **Annualized Return** (return scaled to a yearly rate), **Volatility** (annualized standard deviation of daily returns, representing risk), **Sharpe Ratio** (risk-adjusted return, where a higher value is better, calculated using a 0% risk-free rate), **Max Drawdown** (the largest peak-to-trough decline over the period, measuring

worst-case risk), and **Beta** (the portfolio's sensitivity to the benchmark, shown only for the portfolio). Values are color-coded (green for positive metrics, red for negative).

3. **Return Attribution by Ticker:** A table sorted by the magnitude of contribution (highest to lowest). It shows each ticker's symbol, sector classification, and its **Contribution** in percentage points to the total portfolio return. A horizontal bar chart visually represents the magnitude of the contribution (green for positive, red for negative). The contribution is calculated by equally weighting the ticker's total return over the period.
4. **Return Attribution by Sector:** An aggregated view where the ticker contributions are grouped by their respective sector. This table shows the sector name, the total cumulative contribution from all tickers within that sector, and the number of holdings in that sector. This helps distinguish whether performance is being driven by successful sector allocation or strong individual stock selection.

A yellow warning banner appears at the top if any tickers were excluded from the analysis due to insufficient historical price data for the selected period. The footer confirms the number of symbols analyzed, the weighting methodology (equal-weighted), the benchmark ticker, and the selected period.

Data sources and refresh rate

The core calculation relies on daily historical adjusted close prices fetched from QSTMarkets' internal `market_data_daily` database (which maintains up to 10 years of OHLCV data). An automatic fallback mechanism to the **yfinance** API is implemented for any missing ticker data. Sector information is sourced from the `ref_tickers` table, which is maintained by the NASDAQ FTP ETL pipeline and is used for the sector attribution breakdown. The Beta calculation is performed using ordinary least squares (OLS) linear regression of the portfolio's daily returns against the benchmark's daily returns (utilizing the `scipy` library). To ensure performance and manage computational load, the results are aggressively cached in Redis for **6 hours** for every unique combination of watchlist, period, and benchmark. The cache automatically invalidates if the contents of the underlying watchlist change. The analysis is limited to a maximum of 50 tickers per watchlist; any symbols beyond this limit are automatically truncated with a warning in the panel.

PORTFOLIO PERFORMANCE PERF

NucLear (9) ▼

1M

3M

6M

1Y

2Y

5Y

SPY

ANALYZE

EXPORT CSV

CUMULATIVE RETURN (BASE 100)

Portfolio: 184.89 SPY: 120.11



KEY STATISTICS

METRIC	PORTFOLIO	BENCHMARK
Total return	+71.88%	+14.16%
Annualized return	+72.62%	+14.28%
Volatility	48.49%	18.98%
Sharpe ratio	1.50	0.76
Max drawdown	-26.56%	-13.72%
Beta	1.62	-

RETURN ATTRIBUTION BY TICKER

TICKER	SECTOR	CONTRIBUTION
GEV	Industrials	+17.43%
LEU	Energy	+16.87%
BWXT	Industrials	+10.21%
OKLO	Utilities	+9.11%
TLN	Utilities	+4.67%
DVN	Energy	+3.47%
CEG	Utilities	+2.97%
VST	Utilities	+1.35%
NNE	Industrials	-3.68%

9 symbols Equal-weighted Benchmark: SPY Period: 1Y

REFINE - Refine investment candidates

Command: REFINE

Category: Fundamentals

Requires ticker: Yes (requires 2 to 5 tickers)

Overview

The REFINE command takes 2 to 5 US equity tickers (typically candidates that have already been evaluated with the ANA command) and ranks them using a composite scoring model inspired by Benjamin Graham's value investing principles. The goal is to help the investor decide which of several studied candidates represents the best investment opportunity, ordered from strongest to weakest.

The scoring model evaluates each candidate across four dimensions with the following weights: Quality (40%), Valuation (30%), Momentum (20%), and Sentiment (10%), producing a composite score from 0 to 100. After scoring, the DeepSeek AI model generates a qualitative ranking analysis with justifications and entry price suggestions.

How to use it

Type REFINE followed by the ticker symbols separated by spaces. For example: REFINE AAPL MSFT GOOGL. Minimum 2 tickers, maximum 5. The command can also be typed alone (REFINE) to open an empty panel where tickers can be entered manually and submitted with the **RANK** button. Each ticker's ANA report is fetched from cache (if available from a previous ANA execution within the last hour) or computed on demand, which may take 1 to 4 minutes if all reports need to be generated from scratch.

Reading the output

The panel is divided into four sections:

1. **Comparative Analysis Table:** A table with one row per ticker showing key metrics used in the ranking. Columns include Rank, Ticker (with company name), Score (composite 0-100), Debt/Equity ratio, ROE, Gross Margin, EPS Growth, P/E vs Sector (discount or

premium percentage, negative means undervalued), Margin of Safety, 52-week position percentage, and Insider buying activity. Values are color-coded: green for good flags, yellow for warning, red for danger. High-risk candidates (Debt/Equity greater than 3 and ROE below 5%) have their row highlighted with a red background.

2. **Score Breakdown:** A grid of cards (one per candidate) showing four horizontal bars representing the sub-scores: Quality (0-40, green), Valuation (0-30, blue), Momentum (0-20, orange), and Sentiment (0-10, yellow). This allows quick visual comparison of where each candidate is strong or weak.
3. **AI Ranking Analysis:** A text block generated by the DeepSeek AI model formatted in Markdown. It includes: a numbered ranking with brief justification for each position, a detailed top pick analysis covering strengths and risks, tiebreak criteria if candidates are close in score, and an entry price suggestion based on the margin of safety and support/resistance levels.
4. **Footer:** Shows the AI model used (deepseek-chat), token count, timestamp in Eastern Time, and a **CACHED** label if the result was served from cache.

The panel also includes an **Export CSV** button in the header that downloads the complete ranking data including all metrics and scores.

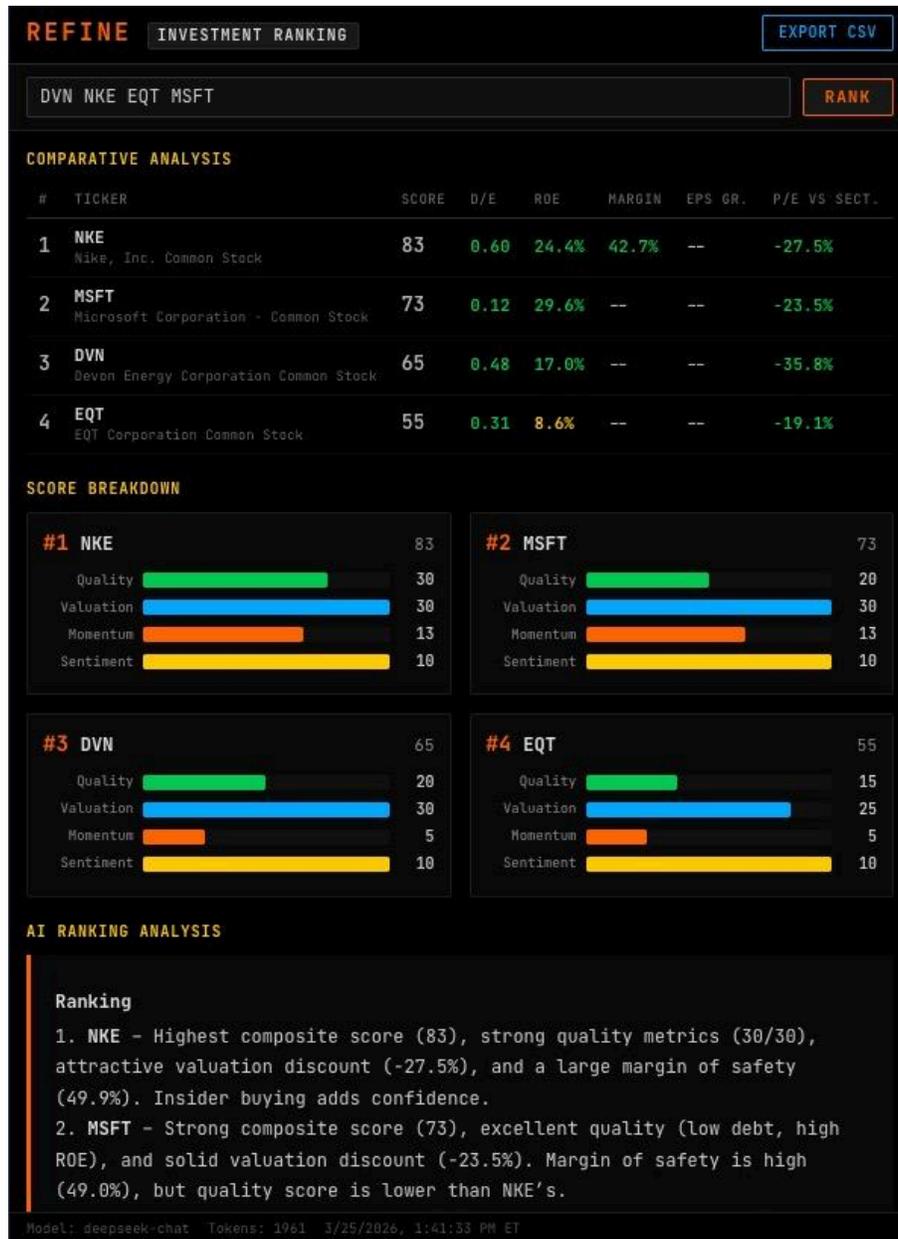
Data sources and refresh rate

The REFINE command relies entirely on ANA reports for its input data. Each ticker's ANA report is fetched from Redis cache (1-hour TTL) or computed on demand. The ANA pipeline sources data from: SEC EDGAR filings stored in the internal MariaDB for fundamental quality metrics (Debt/Equity, ROE, Gross Margin from the `financial_reports` table, with yfinance as fallback for Gross Margin when SEC XBRL data is incomplete), the internal RV calculation service for relative valuation (P/E vs sector median), `market_data_daily` for momentum (52-week range, current price), finvizfinance for insider buying activity, and Finnhub for news headlines. The composite scoring is computed server-side. The DeepSeek AI synthesis uses the `deepseek-chat` model with temperature 0.3. The complete REFINE result is cached in Redis for 1 hour. The first request for a given set of tickers may take 1 to 4 minutes if ANA reports need to be generated; subsequent requests within the hour are instant.

Tips and caveats

- REFINE is designed for **US equities only**. Crypto, Precious Metals, and Energy Commodities are not supported.
- Minimum 2 tickers, maximum 5. If more than 5 are entered, only the first 5 are used.
- For best results, run **ANA** on each candidate first so the reports are cached. Otherwise, REFINE will trigger ANA computations on demand, which adds significant wait time.
- The scoring model is mechanical and rule-based. The AI analysis provides qualitative context but does not override the quantitative score.

- Companies with missing financial data (pre-revenue startups, recently IPO'd companies without full SEC filings) will receive lower Quality scores (potentially 0) and show dashes in the table for unavailable metrics. This is expected behavior, not an error.
- The ranking output does **not constitute financial advice**. It is a decision-support tool based on publicly available data and should be used as a starting point for independent research.
- Results can be exported to CSV using the **Export CSV** button for further analysis in spreadsheet applications.
- REFINE requires authentication (sign-in).



HELP - Help

Command: HELP

Category: System

Requires ticker: No

Overview

The Help command is the master reference manual built directly into the terminal. It provides a searchable index of every available command, explaining what they do and how to format them.

How to use it

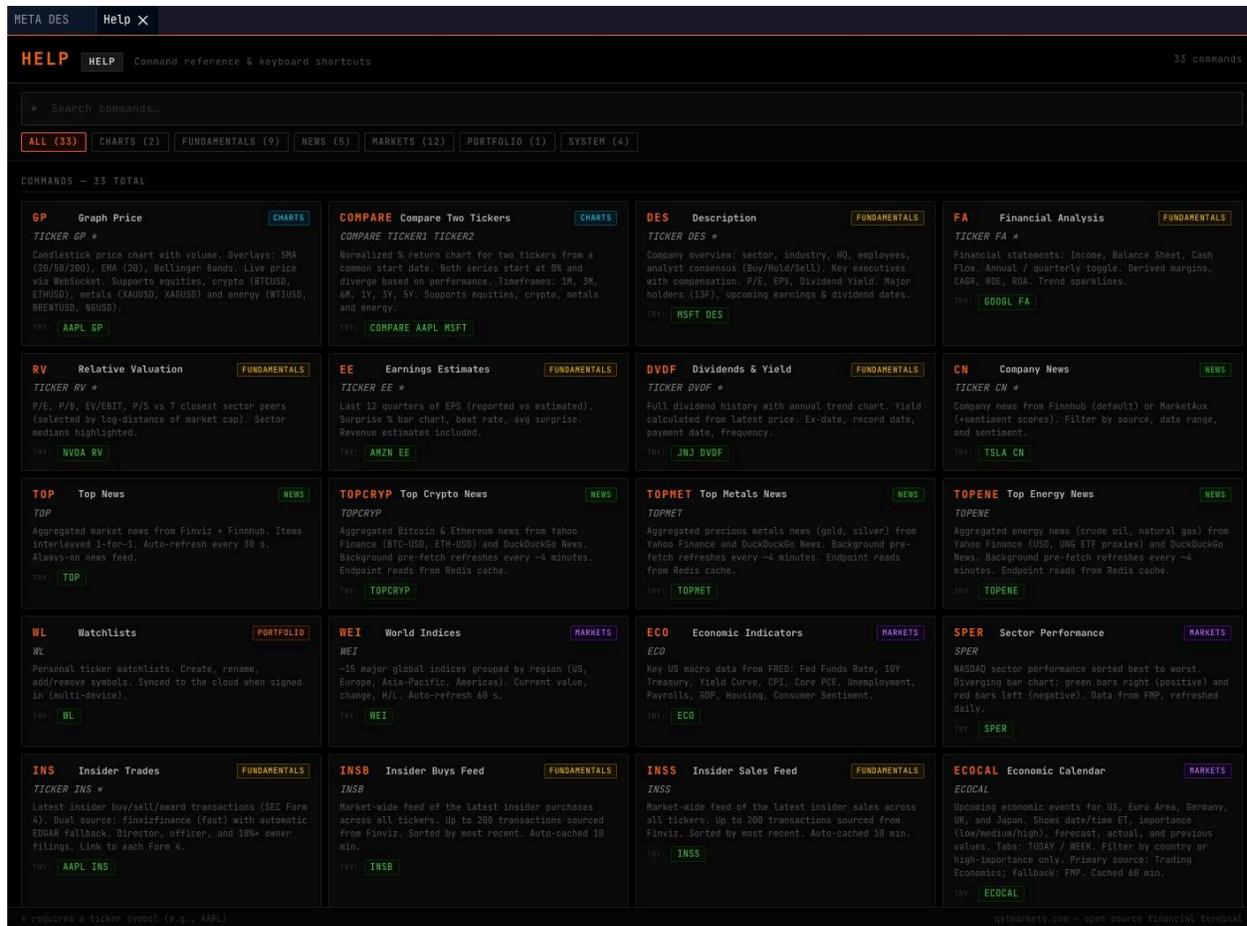
Type HELP and press Enter. The panel organizes commands into logical category tabs (Charts, Fundamentals, News, Markets, Portfolio, System). You can browse these tabs or use the search bar within the panel to find a specific command.

Reading the output

Each entry displays the command syntax, required parameters, and a brief description of its function. A clickable "TRY" button is provided for most commands, which automatically executes a sample query to demonstrate how it works.

Tips and caveats

- Whenever you forget a command mnemonic, or simply want to explore new features added to QSTMarkets, the HELP panel should be your first destination.



Section 3 - Keyboard shortcuts and tips

QSTMarkets is designed to be highly efficient for power users who prefer to keep their hands on the keyboard. Mastering these shortcuts will significantly speed up your workflow.

Action	Shortcut / Tip	Description
Open Command Bar	/ (Forward slash)	Instantly focuses the Command Bar from anywhere in the terminal, ready for typing.
Execute Command	Enter	Runs the typed command and spawns the panel.
Close Panel	Esc (while panel focused)	Closes the currently active/focused panel. You can also click the 'X' in the

		panel header.
Clear Workspace	CLEAR command	Type CLEAR in the Command Bar to close all open panels instantly.
Reset Layout	RESET command	Returns all panels to their default size and tiled arrangement if your workspace gets messy.
Navigate Tabs	Tab / Shift + Tab	Use standard tab navigation to cycle through interactive elements (filters, timeframe selectors, tabs) within an active panel.
Quick Ticker Change	Spacebar syntax	If you have an AAPL chart open and want to see MSFT, just click the Command Bar, type MSFT GP and hit Enter. The terminal is smart enough to open a new panel or update focus.
Modal Selection	Arrow Up/Down	When using search modals like LF, use arrow keys to highlight a result and Enter to select it.

Section 4 - Data sources reference

QSTMarkets relies on a robust architecture of free and freemium data providers to deliver institutional-grade analysis without subscription fees. Below is a comprehensive list of the APIs and data sources powering the terminal.

Provider	Data supplied	Refresh rate & caveats
yFinance	Historical pricing, analyst ratings (UPDN), some	Delayed quotes depending on exchange. Robust

	fundamentals.	historical data. Rate limited on heavy concurrent requests.
Alpaca	Real-time equity market data.	Requires active market hours for live WebSocket streaming. Very low latency.
FMP	Sector performance, economic calendar fallback, SEC filings (LEO, RCRO), top movers.	Highly reliable financial modeling data. Cached hourly to respect free-tier API request caps.
Finnhub	Company news (CN), top market news (TOP).	Fast news delivery. Free tier limits apply, leading to caching mechanisms.
Finviz	Stock screener (SCAN), insider feeds (INSB, INSS), top news aggregation.	Screeners are on-demand; feeds are typically delayed by 10-15 minutes.
SEC EDGAR	Raw company filings, Form 4 insider verification.	Direct from the government. 100% accurate, but parsing can be complex. Used primarily as a verification fallback.
FRED	Core US macroeconomic indicators (ECO).	The gold standard for macro data. Updated dynamically as the St. Louis Fed publishes new prints.
BLS	Inflation data (INFL), labor market data (JOBS, HURG).	Government sourced. Very reliable, updated monthly according to strict release schedules.
Trading Economics	Primary economic calendar events.	Highly accurate forecasts and actuals. Cached hourly.
Tiingo	Supplementary end-of-day pricing and fundamental data.	Used as a redundant fallback for equity pricing to ensure terminal stability.

NASDAQ FTP	Security master list, symbol directories.	Used to populate the internal search database (LF). Updated nightly.
CCXT/Binance	Cryptocurrency spot pricing.	24/7 uptime. Very low latency for crypto charts.
DuckDuckGo News	Specialized news aggregation (TOPCRYPT, TOPMET, TOPENE).	Used via search algorithms to pull niche sector news. Cached to prevent IP rate-limiting.
DeepSeek	AI Market Analysis generation (QSTA).	Relies on LLM inference. Analysis is generated dynamically; generation can take 5-10 seconds.

Section 5 - Frequently asked questions

How do I create an account?

In QSTMarkets creating a free account allows your panel layout, theme preferences, and watchlists to be saved to the cloud and synced across different browsers or devices. Click the profile icon in the top right corner to sign up using an email address.

Why is my chart not updating in real time?

Real-time WebSocket data is only active during standard US market hours (09:30 to 16:00 ET, Monday through Friday). If you are viewing a chart outside of these hours, on a weekend, or on a market holiday, the chart will display the final closing price and remain static until the market reopens.

Why does a specific command show "No data found" for my ticker?

Not all data providers cover every asset class. For example, trying to pull a financial statement (FA) on a cryptocurrency (BTCUSD) will fail because cryptocurrencies do not file SEC 10-K reports. Similarly, very small micro-cap stocks or newly listed IPOs might not yet have analyst coverage (EE) or established dividend histories (DVDF).

Which web browsers are supported?

QSTMarkets is optimized for modern, Chromium-based browsers (Google Chrome, Microsoft Edge, Brave) and Firefox. For the best performance, especially when running multiple live

WebSocket charts simultaneously, hardware acceleration should be enabled in your browser settings.

Is there a mobile app?

Currently, QSTMarkets is a web-only application designed primarily for desktop and laptop displays due to the dense, multi-panel nature of financial data. While it will load on a mobile browser, the interface is difficult to navigate on small touchscreen devices. A tablet in landscape mode is the minimum recommended mobile setup.

How do I report a bug or suggest a new command?

We actively encourage community feedback. Click the [Contact us](#) link in the bottom bar, to the left of the version number. A short form will appear, type your message and click Send. Your feedback is delivered directly to the development team. No account details beyond your registered email are required; that is included automatically.

What does it mean if the terminal says it is in "Maintenance Mode"?

Because QSTMarkets relies on over a dozen external data APIs, we occasionally need to put the terminal into Maintenance Mode to upgrade our backend routing, rotate API keys, or implement rate-limit protections. During this time, live data feeds may be paused. Maintenance is almost exclusively performed on weekends to avoid disrupting trading activities.

