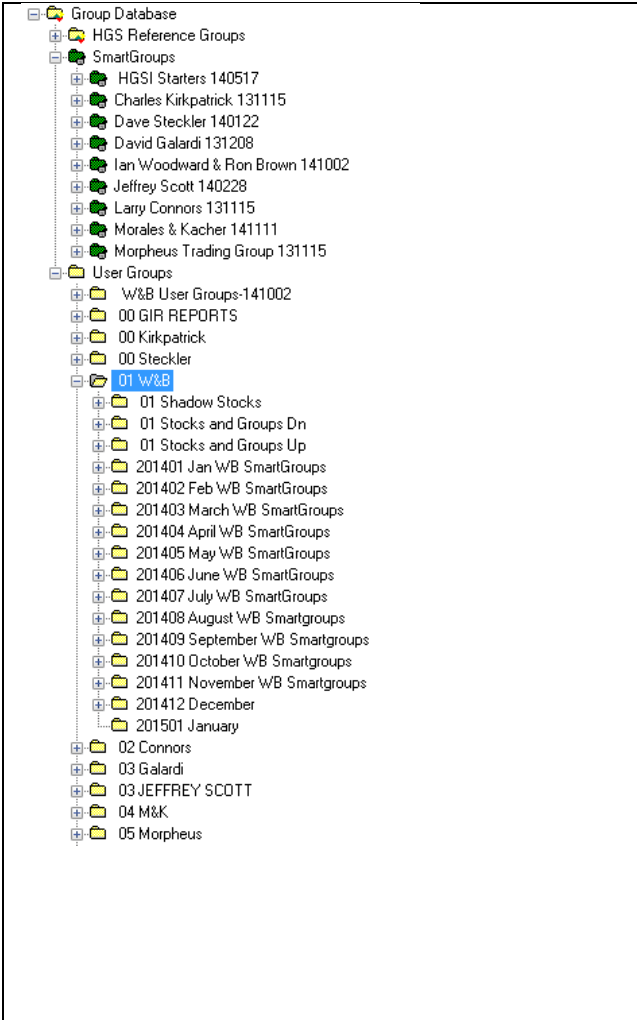
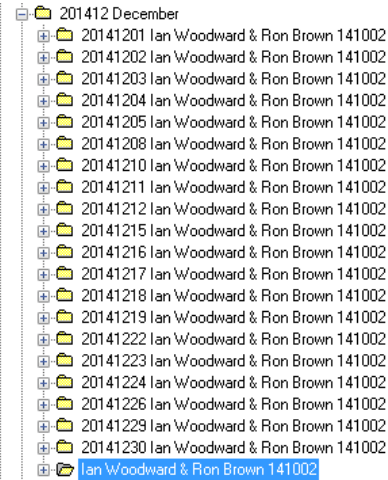


At the 2014 HGSI Fall Seminar, Chris White unveiled his Group History report, and I think everyone in the room was very impressed with the template, and how he and Ron Brown, had developed a method which would allow you to see when stocks were appearing, or re-appearing, in smart groups that you may be following. I was, so I started to build a daily Smart Group history, so that I could later inspect them with the template. I am sure that some of you have done the same.

Since I wanted to look at various Smart Groups, the first thing that I noticed – after how powerful this template was, was that a lot of folder navigation to identify where the source files are stored, was required. This was getting tedious, and for some time, I found it to be a chore to use this template regularly. Fortunately, I found a technique, that some of you may be using already, which eliminates the need for any browsing activity within Edgerater.

Since I don't want to confuse anyone who may be new to using the template, I am going to explain the entire process. If this is familiar, read ahead. The first step is having a history of smart groups to examine. If you have not been saving smart groups, the first thing that you must do is to create a User Folder in HGSI, to hold the specific smart group, or set of smart groups, that you wish to examine in the future. If you are new to this, you will need to do this every day for at least a week, for the template to be interesting. If you miss a day, no big deal, but it does distort the results slightly. Saving the smart groups every day only takes a few seconds, so just make it part of your routine.

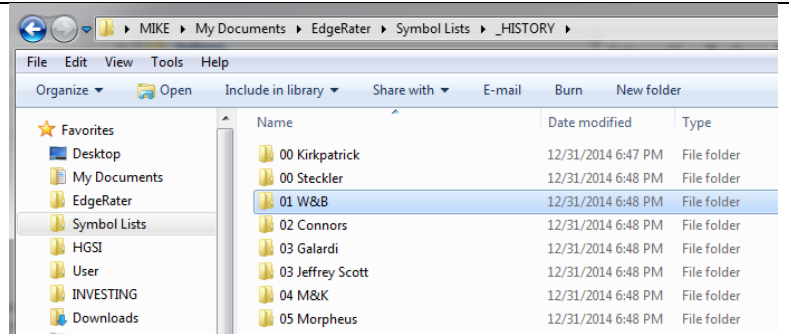
	<p>This is a screen show of my HGSI folders. In the User Groups section, you can see that I have created folders to store various Smart Groups – you will notice that the W&B folder has a series of folders for each month. Every day, I click on the W&B set of smart groups and drag them down into the folder of the current month, for example, yesterday, I dragged them into the 201212 December folder.</p>  <p>The highlighted folder at the bottom, is the entire set of W&B folder for 12/31. Now there is one more thing for you to do – see the date in front of the other folders? You must edit the name of the highlighted folder, so that you add the date “20141231” in front of the Group name. This step is required, so that Edgerater can scan these folders later.</p>
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Now, you are ready for the next step, which is to export these groups from HGSI to your EdgeRater Symbol Lists folder.

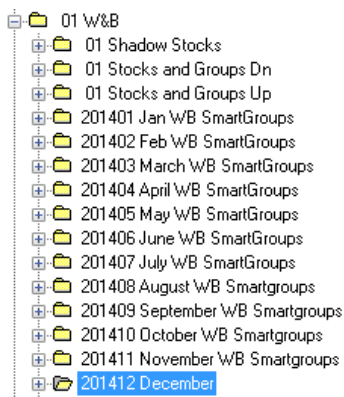
In Windows Explorer, navigate to the Edgerater folder where your symbol lists are stored.

Now, you could export directly to this folder, but it quickly become a mess of files, so you will need to create a folder, or folders to store the files that you will be exporting from HGSI. You can name these files whatever you want – I have chosen to name them in the same way that they are organized in HGSI, to keep things simple.

So, by looking at the Navigation bar in the screenshot, you can see that in the Symbol Lists folder, I have created a History Folder, and in the main part of the image, then you can see the folders that I have created.



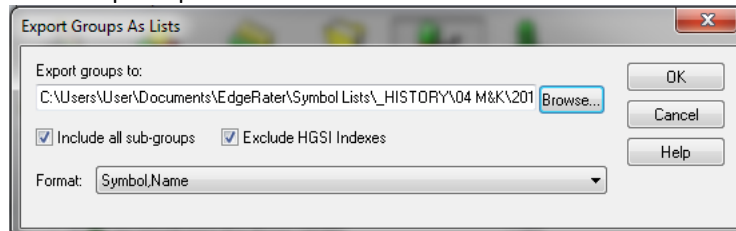
We will focus on how to get data into the 01 W&B folder.



In HGSI, select the folder for the latest month.

Next, in the Designer's **FILE** Menu, click on **ASCII Utilities**, and then **Export Groups as Lists**

This will open a panel that looks like this:

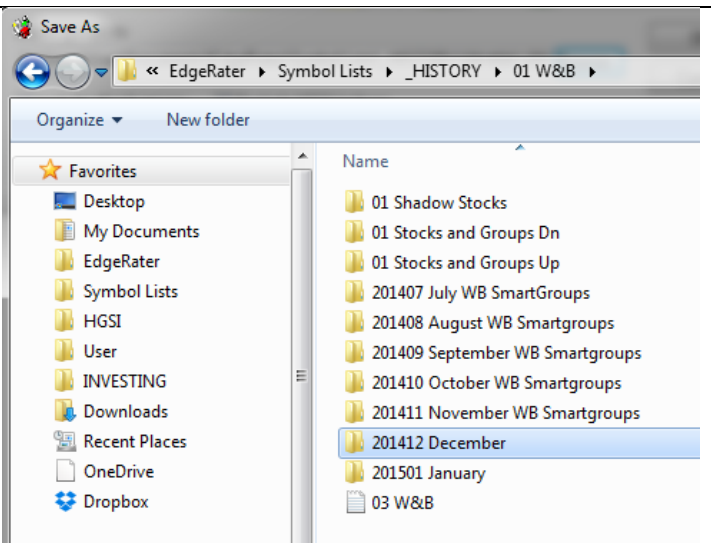


This will open to the path that you last exported files – you will need to browse to the folder where you want to export your files – since we are exporting the W&B files for December, we want to navigate to that folder.

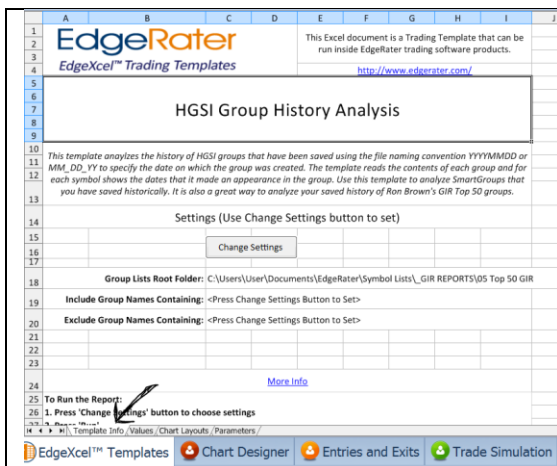
Browse to the folder that you created to hold the December W&B files. Remember, you can name the folders however you want, and if you simply wanted a single folder for W&B, you could do that, although the downside would be that there would eventually be a huge number of files. This probably would not affect Edgerater performance, but it would be a little cluttered.

Once you have selected the appropriate destination folder, click SAVE. You will see that the Export folder destination is now updated.

Click OK, and then Yes to overwriting the existing files. Your symbol lists for Edgerater should now be up to date.



Next, open Edgeater, and open the Group History template that is found within the Group History section of the W&B templates:



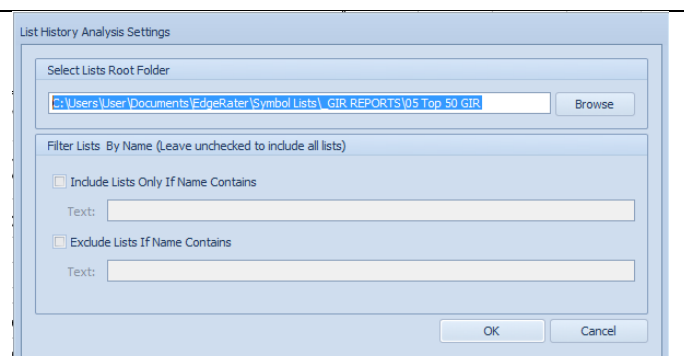
By default, you will be on the Tab called “Template Info”.

When you run the template, you will notice that you are on the “Values” tab.

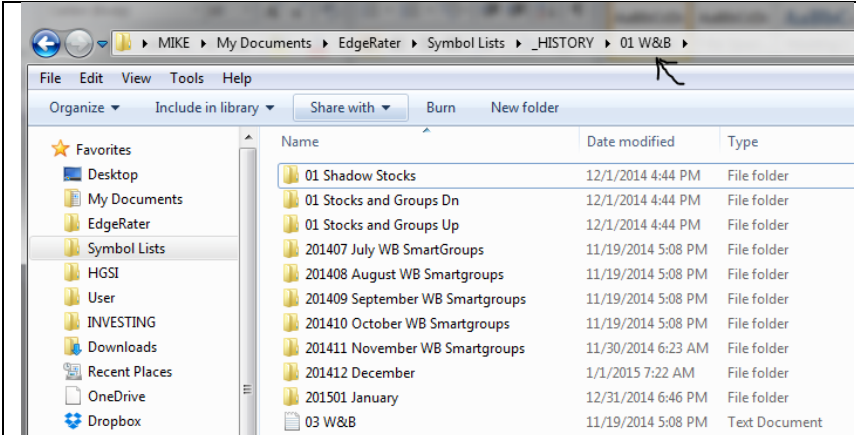
Our goal at this point is to update the settings. Click on “Change Settings”.

In the Selection Box, you will see high-lighted, the last Symbol list folder that had been used, or if this is the first time using the folder, then it would be blank.

At this stage, you would normally use the Browse button to navigate to the Symbol List folder where you had stored the W&B files. I use Windows 7, and found that every time I browsed, it did not remember where I had previously browsed, so it required a lot of clicking and this became a bit tedious. Fortunately, I found an alternative way to get the information that you need for the Select Lists Root Folder section.



Now, you will need to open Windows Explorer, and navigate to the folder where the files are stored that you want to examine with the template. Refer to the image below:



Name	Date modified	Type
01 Shadow Stocks	12/1/2014 4:44 PM	File folder
01 Stocks and Groups Dn	12/1/2014 4:44 PM	File folder
01 Stocks and Groups Up	12/1/2014 4:44 PM	File folder
201407 July WB SmartGroups	11/19/2014 5:08 PM	File folder
201408 August WB Smartgroups	11/19/2014 5:08 PM	File folder
201409 September WB Smartgroups	11/19/2014 5:08 PM	File folder
201410 October WB Smartgroups	11/19/2014 5:08 PM	File folder
201411 November WB Smartgroups	11/30/2014 6:23 AM	File folder
201412 December	1/1/2015 7:22 AM	File folder
201501 January	12/31/2014 6:46 PM	File folder
03 W&B	11/19/2014 5:08 PM	Text Document

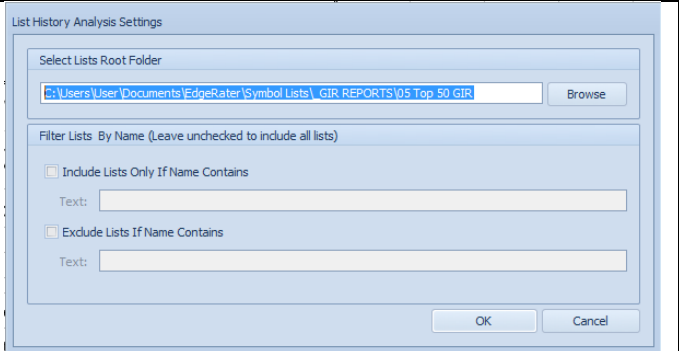
Note that I did not select the December set, I stopped at the 01 W&B level. This will give me the entire W&B history, rather than just the history for December, if I had drilled down to that level.

See the arrow pointing to W&B, I want you to right-click on that item in the Address Bar.

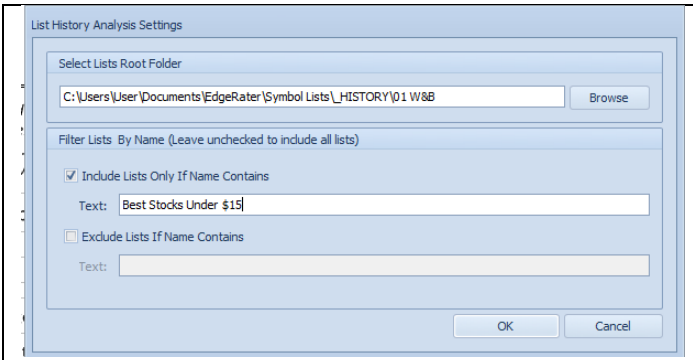
At this point, the right clicking of that folder will give your four options - select the first one - this will copy the address of that folder and place it in the Windows clipboard.

Next, back to Edgerater, your next step is to select and delete the folder address that is currently high-lighted.

Now, with your cursor still in the Select Folder area, hold down the keyboard keys "CTRL" and "V" at the same time - this is a Windows technique for pasting the last thing placed in your clipboard - your copied folder address should now be visible in this folder.



Here is where things get really cool!!!!




You can see that the folder address is now correctly pointed in the Select Lists Root Folder section.

Note that I have checked the "Include Lists" arrow, and I have pasted in the name "Best Stocks Under \$15".

Since you have the entire set of W&B Smart Groups saved, you can now report this report for ANY of the W&B Smart Groups!!! Ever wonder if they are any value? Well, now you can see how well any of the saved W&B Smart Groups work.

After clicking OK, in the panel above, and then running the template, these are the Best Stocks under \$15 recently.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	 EdgeXcel™ Trading Templates		Group History Analysis Report										
2													
3													
4			Shows symbols and events. A 'Yes' indicates the symbol appeared in the group on the column date										
5													
6													
7	Symbol	Description	12/31/2014	12/30/2014	12/29/2014	12/26/2014	12/24/2014	12/23/2014	12/22/2014	12/19/2014	12/18/2014	12/17/2014	12/16/2014
8	CYTK	Cytokinetics Inc	Yes	Yes	Yes	Yes	Yes	Yes		Yes			Yes
9	MDXG	Mimedx Group Inc	Yes				Yes		Yes		Yes	Yes	Yes
10	HZNP	Horizon Pharma Inc	Yes	Yes	Yes				Yes	Yes	Yes	Yes	Yes
11	TSEM	Tower Semiconductor Ltd	Yes	Yes	Yes	Yes							
12	PLNR	Planar Systems	Yes	Yes	Yes	Yes		Yes	Yes		Yes		Yes
13	GOL	Gol Linhas Aereas Inteligentes S.A.	Yes	Yes	Yes	Yes					Yes		
14	XNPT	Xenoport Inc	Yes	Yes	Yes	Yes	Yes			Yes		Yes	
15	HW	Headwaters Inc	Yes	Yes	Yes		Yes	Yes	Yes	Yes		Yes	Yes
16	PACB	Pacific Biosciences of California	Yes			Yes			Yes	Yes	Yes	Yes	
17	RPTP	Raptor Pharmaceutical	Yes	Yes	Yes								
18	ENPH	Enphase Energy Inc	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
19	PGEM	Ply Gem Holdings Inc	Yes	Yes	Yes		Yes						Yes
20	FOLD	Amicus Therapeutics	Yes		Yes	Yes	Yes		Yes	Yes		Yes	
21	ANW	Aegean Marine Petroleum Netwo	Yes	Yes	Yes			Yes					Yes
22	QLGC	Qlogic Corp	Yes	Yes			Yes				Yes	Yes	Yes
23	FORM	Formfactor	Yes			Yes			Yes				Yes
24	RKUS	Ruckus Wireless Inc	Yes							Yes			
25	ODP	Office Depot	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
26	NAT	Nordic American Tanker Shipping	Yes				Yes	Yes		Yes	Yes	Yes	Yes
27	XCRA	Xcerra Corp.	Yes	Yes	Yes	Yes	Yes	Yes	Yes				

Now, let's say that you wanted to look at the Best of Woodward and Brown, HGS 100, Stocks and Groups Moving to Upside \$1-15, etc – all that you have to do is change that name in the “Include Lists” section. Pretty powerful!!!

But wait – It gets better!

Ever wondered how effective those Connors, Kirkpatrick or Morpheus groups are? Well, with this capability, all that you have to do, is save a daily history of all those Smart Group sets and follow this process. To pull down all the group sets, into User Groups can be done in less than 2 minutes, including renaming the groups, so you know can find the Smart Groups that best support you strategy.

I hope that this is helpful to you. I cannot provide any support for HGSI or Edgerater, but if you have questions on the process, or suggestions to improve it, please contact me at mikemacdonald2006@hotmailcom