



# Stock Quotes For Excel

- ✓ Version: 4.5.0
- ✓ Company: Jabsoft (<http://www.jabsoft.com>)
- ✓ Sales and Offers: Model Advisor (<http://www.modeladvisor.com>)

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## Description

### What's Stock Quotes for Excel?

Stock Quotes is a very useful add-in for Excel. With Stock Quotes you can query stock quotes, mutual funds, Indices, historical data and option prices directly in your Excel spreadsheet. For that purpose, Stock Quotes has a number of Excel-based functions, which Stock Quotes uses to retrieve current and historical data.?

### What are the advantages?

- ✓ It seamlessly integrates to Microsoft Excel with functions that allow you to intuitively enter parameters, and query online for their values.
- ✓ You can query online for current and historical data, directly in Excel.
- ✓ You can refresh data either manually or automatically at customized time intervals, without disturbing your work in Excel.
- ✓ Stock Quotes is a mature product in the global market and has thousands of users around the world.
- ✓ All functions have a step-by-step wizard, so you just can't fail to understand how Stock Quote works!
- ✓ Stock Quotes includes example videos for all tools, in addition to the usual help texts.
- ✓ Stock Quotes fetches online quotes from two well known and renowned sources worldwide, as you will see below.

### Where does Stock Quotes fetch quote values from?

- ✓ MSN Money Central Investor (<http://moneycentral.msn.com/investor/home.asp>)
- ✓ Yahoo! Finance (<http://finance.yahoo.com/>)

### What are the restrictions?

1. Stock Quotes query for data from the above sources, so we are subject to the features provided by them, as detailed below
2. Stock Quotes will not show current intraday data Saturdays or Sundays, and may not even show any data at all those days.
3. No historical data is shown on Saturdays and Sundays. So please make sure to query for such data on weekdays.
4. Not all Company or Stock Index ticker symbols are the same between MSN Money and Yahoo! Finance, so please make sure to use the right symbols. You are provided with links to both websites so you can look for the right symbols.
5. With Stock Quotes you can query for information of any number of company ticker symbols. However, bear in mind that the larger the volume of information required, the longer it will take to update the information.

Assuming users with average resources, lab tests have shown the following results:

Number of ticker symbols	Update Time
<= 100	5 seconds
<=1000	15 seconds
<= 5000	2 minutes
<=10000	5 minutes

Additional factors affecting these times include:

- ✓ Internet connection speed.
- ✓ Hardware and software features of your computer.
- ✓ And of course, the number of ticker symbols queried.

6. Querying for historical data takes much longer than for current intraday stock quotes.

**WARNING:**

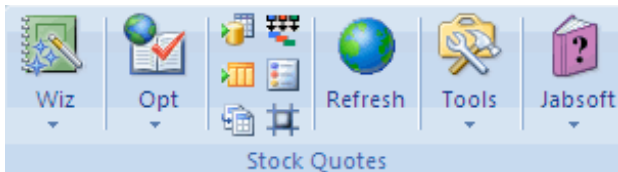
Take into account that these values are only for reference, **THEY ARE NOT EXACT.**

The best way to know how long does it take in your on computer is by trying the trial version that you can download free from:

[http://www.jabsoft.com/stock\\_quotes\\_for\\_excel/stock\\_quotes\\_for\\_excel.zip](http://www.jabsoft.com/stock_quotes_for_excel/stock_quotes_for_excel.zip)

Remember that this product is sold under the guarantee **Try Before You Buy**. Please, find out if it satisfies your needs before purchasing because later you will not entitle for refund.






## Stock Quotes - Excel 2007 and Excel 2010









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



### Opt

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**Refresh data**

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## Requirements

- ✓ MS Windows XP or more
- ✓ MS Excel 2007 or more

If you use Windows Vista or above, it will be necessary to activate some permissions.

This video will teach you how to configure some permission to make this tool work out correctly.

[http://www.jabsoft.com/model\\_builder\\_for\\_excel/videos\\_emb/security\\_demo\\_xmb/security\\_demo.htm](http://www.jabsoft.com/model_builder_for_excel/videos_emb/security_demo_xmb/security_demo.htm)

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The Stock Quotes data is obtained from the MSN Money Central Investor web site:

<http://moneycentral.msn.com/investor/Home.asp>, and Yahoo Finance Web Site <http://Finance/Yahoo.com> . Also you are involved with the conditions of use of this web site.

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## Stock Quotes Wizard

This wizard helps you set the `SQ()`, `SQY()`, `Idx()`, and `Idxy()` functions, to make online queries from Yahoo! Finance and MSN Money.

- Use the **`SQ()`** function to get individual stock data from MSN Money.
- Use the **`SQY()`** function to get individual stock data from Yahoo! Finance.
- Use the **`Idx()`** function to get stock market index data from MSN Money.
- Use the **`Idxy()`** function to get stock market index data from Yahoo! Finance.

You can use this wizard to enter these functions, or you can enter them manually, just like any other Excel function.

The above functions have the following arguments:

### **`SQ("IBM", "Last")`**

As you can see, `SQ()` has two arguments, the company's ticker symbol and the type of data. This function only retrieves current intraday data, as opposed to historical data. The data is provided by MSN Money.

### **`SQY("IBM", "Last")`**

Here again you can see that `SQY()` has two arguments, the company's ticker symbol and the type of data. This function only retrieves current intraday data, as opposed to historical data. The data is provided by Yahoo! Finance.

### **`ndx("$NL:AEX", "Last")`**

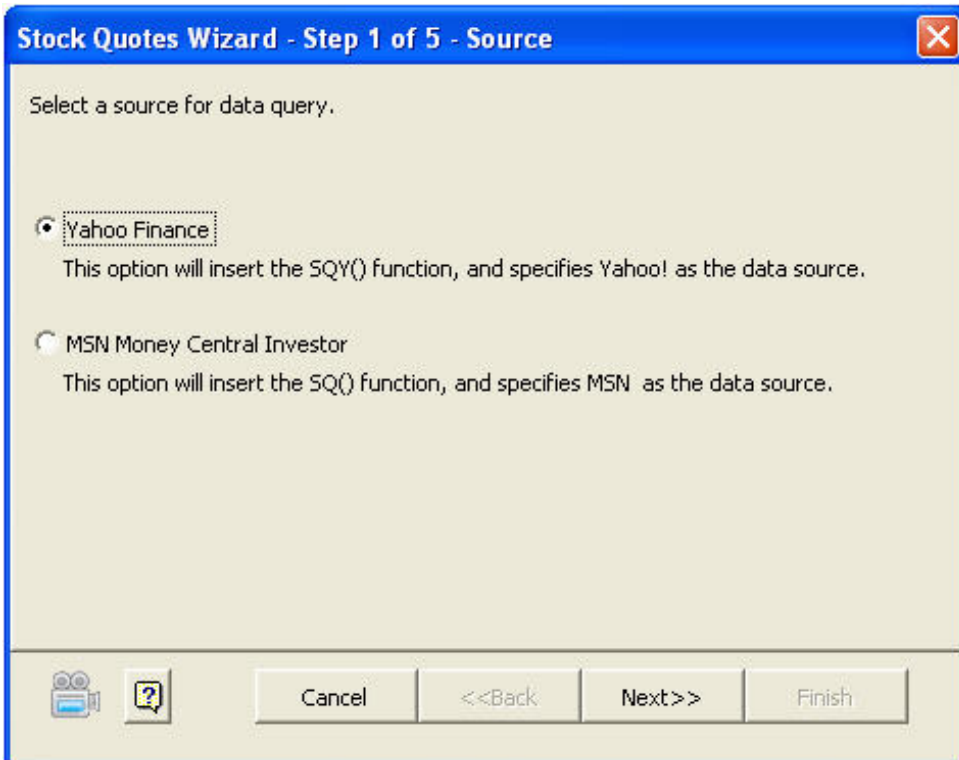
This function retrieves online stock market index data from MSN Money. It does not get historical data.

### **`ndxy("^DJA", "Last")`**

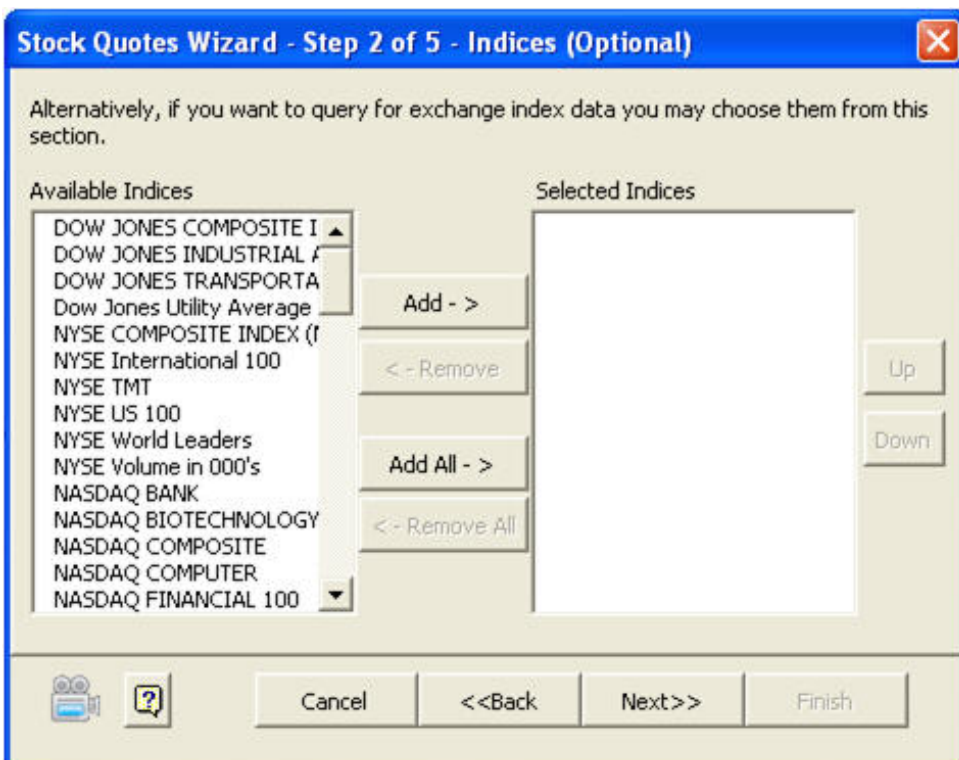
This function retrieves online stock market index data from Yahoo! Finance. It does not get historical data.

The following example should clarify how this works:  
Open the Stock Quotes Wizard dialog box.

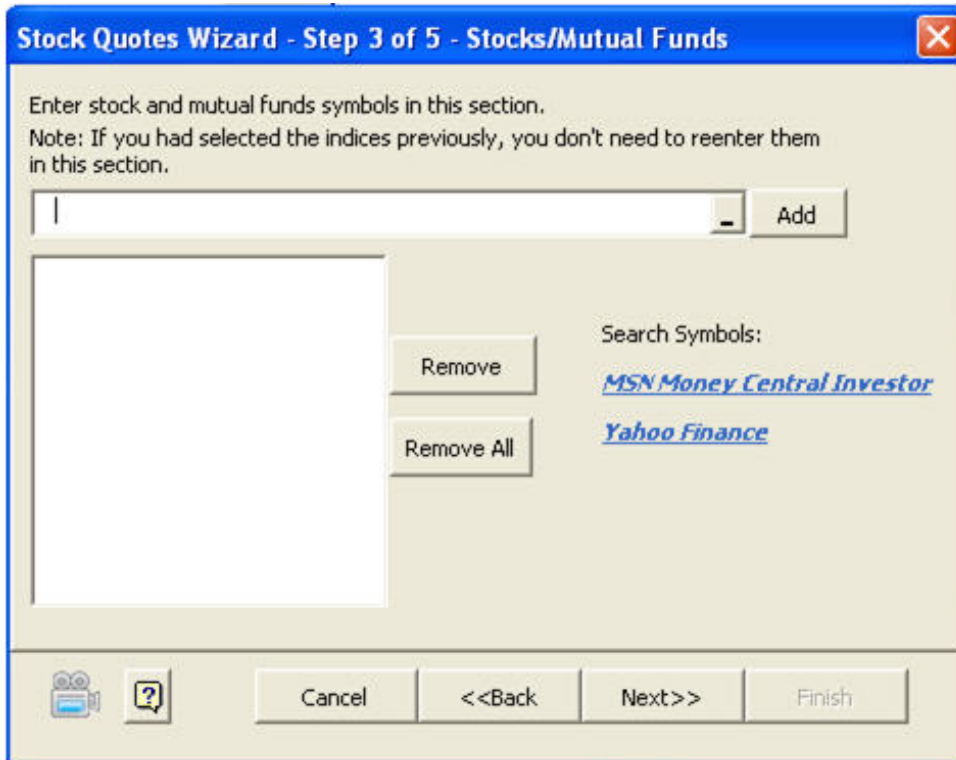




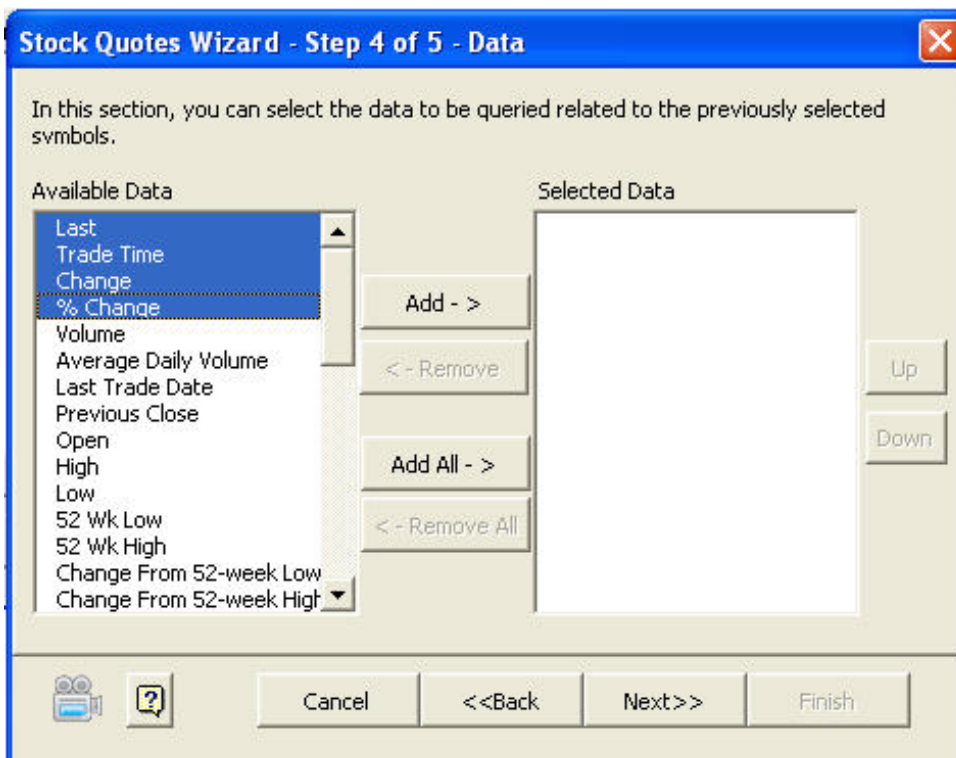
You are shown the two possible data sources available to Stock Quotes. Choose Yahoo! Finance and click on **Next**.



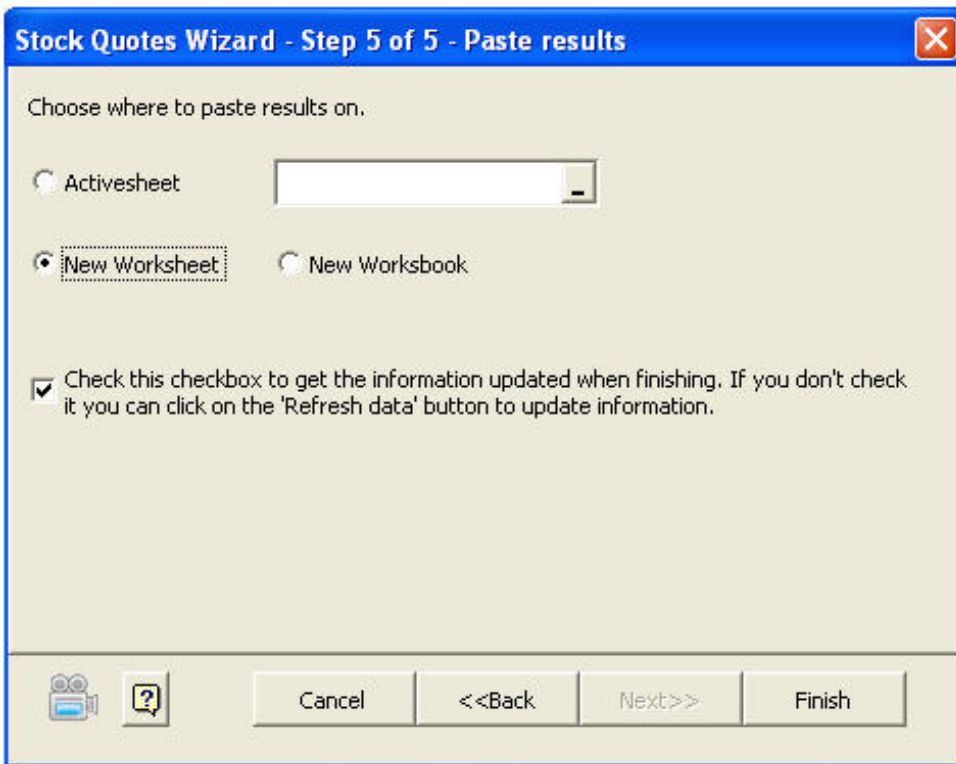
This step is optional. If you do not want to query for stock market indices, just skip it by clicking Next. This list includes all stock market indices available in Yahoo! Finance. Select the first four, click the **Add ->** button, and then **Next**.



In this step you can select the cells in your spreadsheet containing the ticker symbols to be queried. You are provided with links to the websites to check for ticker symbols used by MSN Money and Yahoo! Finance if you want to. Then click **Next**



In this step, select the data items to be queried. For more information on data items, click [here](#). Choose the first four data items, click **Add ->**, and then **Next**.



Choose the cells in your spreadsheet where results will be pasted. There is also an option checked by default that indicates if you want to get the data updated when you are finished. If you do not uncheck it, all data will be updated as you finish. Otherwise, you can always click on the "Refresh data" button to update the information. Just click on **Finish**.

B2     fx =Indxy("^DJA","Last" )

	A	B	C	D	E	F
1						
2		4,302.02	1:35pm	-6.57	-0.15%	
3		11,853.35	1:35pm	10.66	0.09%	
4		5,122.42	1:35pm	-71.60	-1.38%	
5		525.16	1:35pm	6.31	1.22%	
6						
7						
8						
9						
10						
11						
12						

As you can see, this wizard entered the intended function for us, in this case, querying for stock market indices from Yahoo! Finance. Now you will have up-to-the-minute stock data directly on your spreadsheet! You can also do this manually, or you can use the wizard. Click [here](#) to see how to do it.





## Create a watchlist rapidly

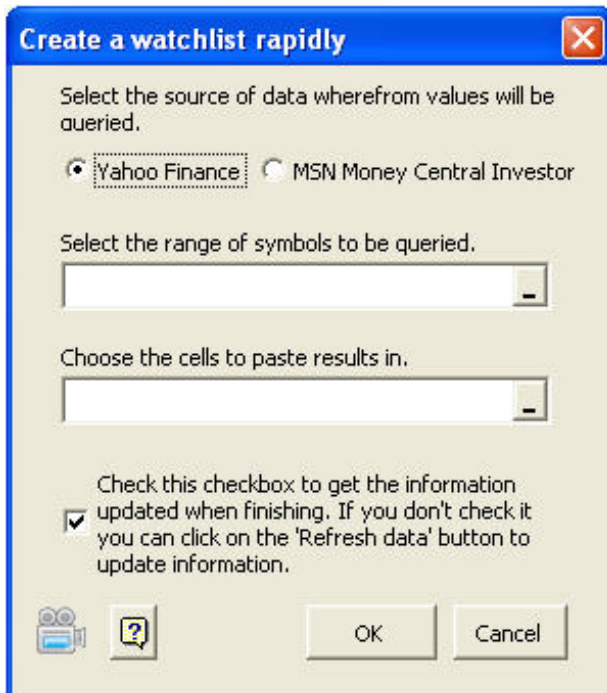
Use this tool to quickly create a watchlist, as its name indicates.

Symbol	Last	Change	% Change	High	Low	Volume
MSFT	27.97	-0.26	-0.92%	28.41	27.79	56993000.00
IBM	123.46	0.72	0.59%	124.50	122.40	5816893.00
AAPL	173.16	-2.11	-1.20%	175.88	171.56	23006632.00
ACE	56.46	-0.65	-1.14%	57.50	56.28	1930273.00
AMT	42.03	-1.27	-2.93%	43.56	41.77	5535222.00

The advantage of using this functionality are the customized visual formats, which update as the data does. In this first version of Stock Quotes watchlist, only the following values are shown by default: Last, Change, % Change, High, Low, and Volume.

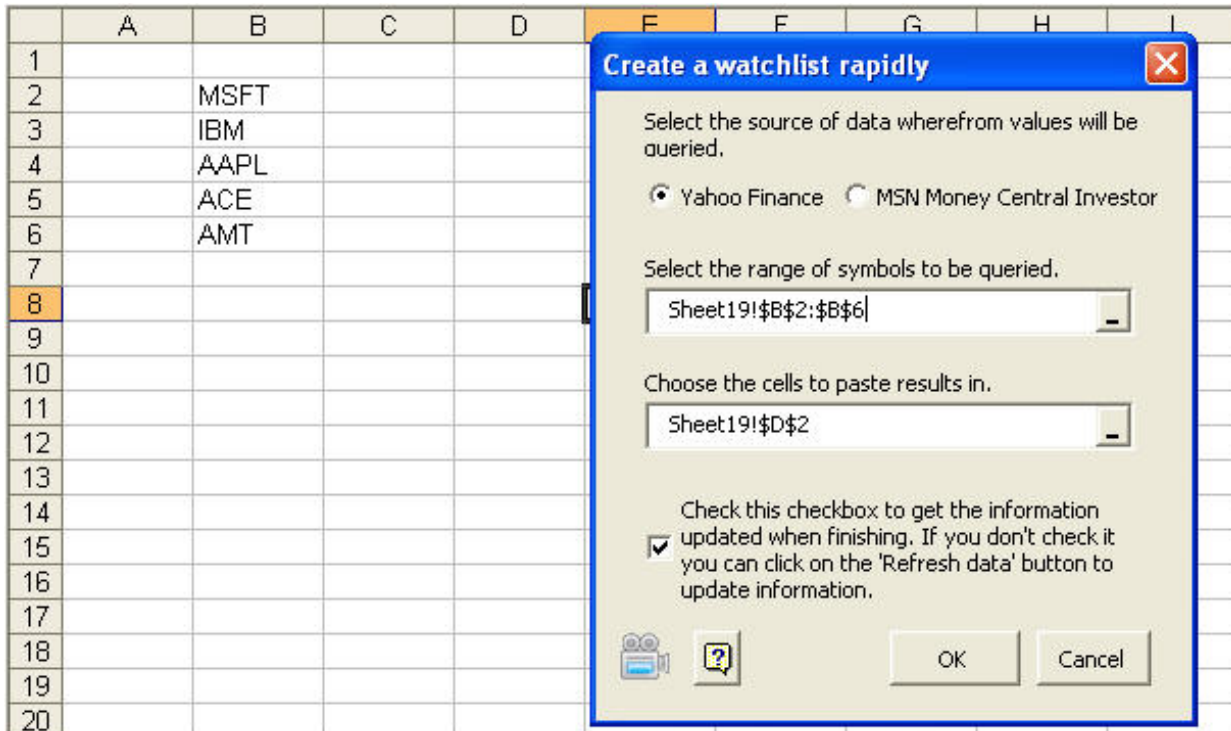
However, you can add manually other data items, depending on the source you chose in the first place. Click [here](#) to check for the data items available in each source.

The next example shows how this tool works:  
Open the **Create a watchlist rapidly** dialog box.



Choose the data source your watchlist will query from. If you choose Yahoo! Finance, the SQY( ) function will be used. If you choose MSN Money, the SQ( ) function will.

Get the information as shown in the following screenshot:



Click **OK**.

You should get the following watchlist:

Symbol	Last	Change	% Change	High	Low	Volume
MSFT	27.97	-0.26	-0.92%	28.41	27.79	56993000.00
IBM	123.46	0.72	0.59%	124.50	122.40	5816893.00
AAPL	173.16	-2.11	-1.20%	175.88	171.56	23006632.00
ACE	56.46	-0.65	-1.14%	57.50	56.28	1930273.00
AMT	42.03	-1.27	-2.93%	43.56	41.77	5535222.00

The data of your watchlist will be updated at fixed time intervals defined used the **Refresh Settings** tool.



## Stock Quotes by Date Wizard

Use this wizard to enter the SQByDate( ) function to query for historical data.

The SQByDate( ) function has three arguments: **SQByDate( "symbol", "mm/dd/yyyy", "data\_type" )**

Where:

**symbol:** can be any valid ticker symbol as used by Yahoo! Finance.

**mm/dd/yyyy:** is the date from which you want to retrieve data (no later than yesterday).

Dates should be entered in the **Month/Day/Year** format e.g. 5/12/2007

**Data type:** it may be Open, High, Low, Close, Volume, Adj Close.

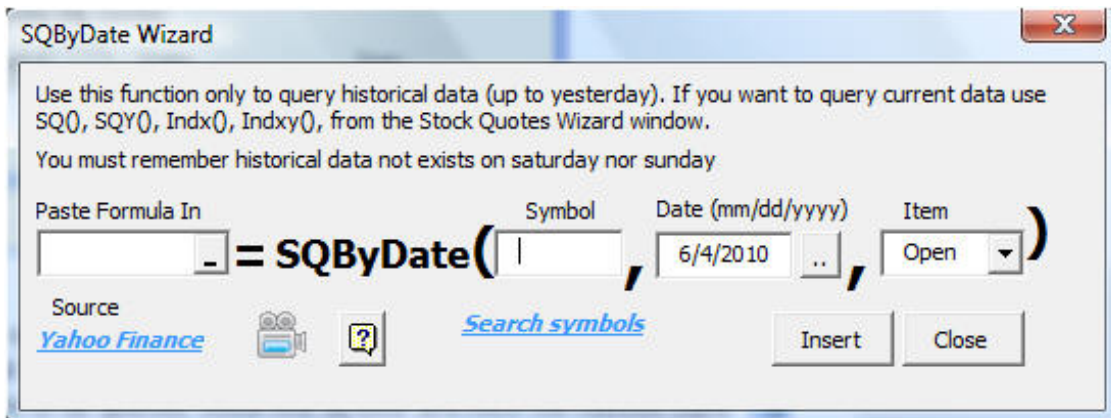
### Example:

```
=SQByDate("MSFT", "6/14/2006", "Close")
```


The data source is Yahoo! Finance.

**Note:** Bear in mind that there is no historical data available on Saturdays and Sundays. For example, if you want to know the closing price of Microsoft (MSFT) on June 18, 2006, you cannot make a query because it was Sunday.

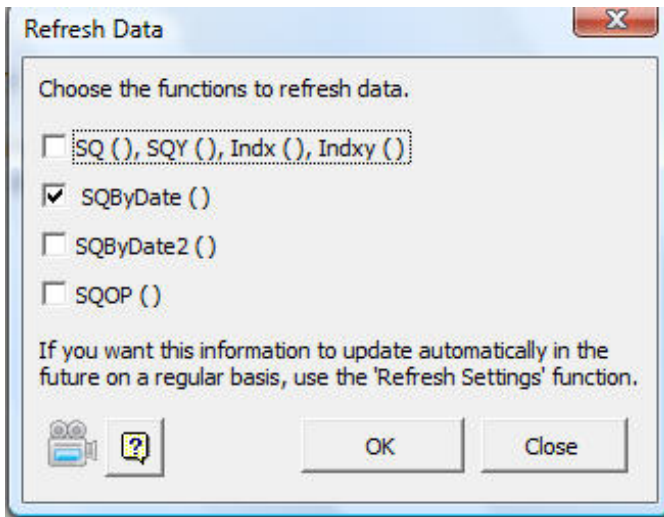
Rather, you should query for data on the last Friday before that date, in this example June 16, 2006. If you fail to observe this remark, you will not get the data intended.



Once you are familiar to this function, you will no longer need this dialog -by then you will be able to enter the function manually, just like any other Excel function.

**Note:** After entering all the historical data items to be queried, close this window and click the Refresh Data  button, and check the second checkbox, as shown in the following screen shot:





Stock Quotes has the Data Downloader function. Use it to download historical prices within a range of dates. You can also use it to draw line charts of stock prices. In addition, you can download financial statements directly to your Excel spreadsheet. Click [here](#) for more on this tool.





## Stock Quotes by Date 2 Wizard

It is an alternative function to SQByDate(), it has been developed in order to avoid conflicts of formats in dates, so it allows to make explicit the month, day and year of consultation.

Use this wizard to enter the SQByDate2( ) function to query for historical data.

The SQByDate2( ) function has five arguments: **SQByDate2("symbol", "mm", "dd", "yyyy", "data\_type")**

Where:

**symbol:** can be any valid ticker symbol as used by Yahoo! Finance.

**mm:** month, e.g. 4

**dd:** day, e.g. 24

**yyyy:** year, e.g. 2005

**data\_type:** it may be Open, High, Low, Close, Volume, Adj Close

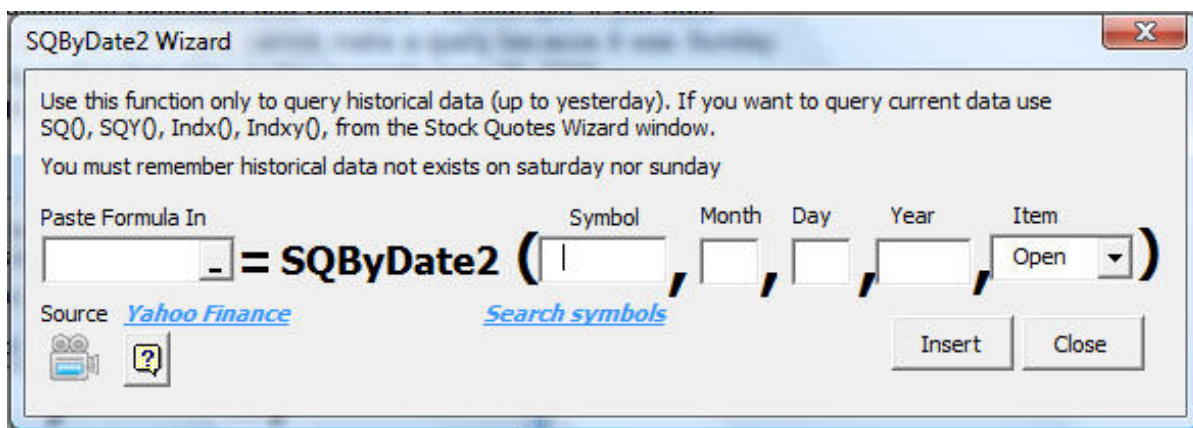
### Example:

=SQByDate2("MSFT", "6/14/2006", "Close")


The data source is Yahoo! Finance.

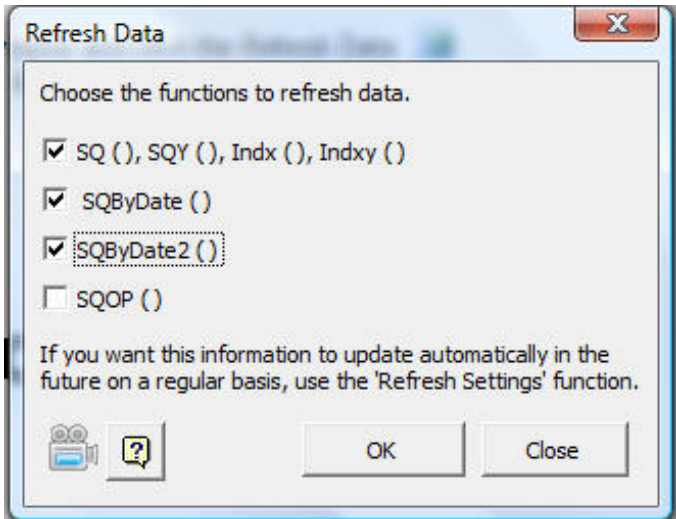
**Note:** Bear in mind that there is no historical data available on Saturdays and Sundays. For example, if you want to know the closing price of Microsoft (MSFT) on June 18, 2006, you cannot make a query because it was Sunday.

Rather, you should query for data on the last Friday before that date, in this example June 16, 2006. If you fail to observe this remark, you will not get the data intended.



Once you are familiar to this function, you will no longer need this dialog -by then you will be able to enter the function manually, just like any other Excel function.

**Note :** After entering all the historical data items to be queried, close this window and click the Refresh Data  button, and check the second checkbox, as shown in the following screen shot:



Stock Quotes has the Data Downloader function. Use it to download historical prices within a range of dates. You can also use it to draw line charts of stock prices. In addition, you can download financial statements directly to your Excel spreadsheet. [Click here for more on this tool.](#)

## HiperLynk to Web Services Wizard

This tool will enable you to very easily add to your spreadsheets, web links relating to a set of corporate symbols, which will lead you to different types of Stock Quotes and other information, such as the company's business, who are its competitors, News, Events, etc.

	A	B	C	D	E
1					
2		<b>Enterprise Name</b>	Altana AG	Microsoft Corporation	American Tower Corporation
3		<b>Symbol</b>	AAA	MSFT	AMT
4			<u>Fundamentals</u>	<u>Fundamentals</u>	
5			<u>Chart</u>	<u>Chart</u>	
6			<u>News</u>	<u>News</u>	
7			<u>Competitors</u>	<u>Competitors</u>	
8			<u>Stock Rating</u>	<u>Stock Rating</u>	
9			<u>Price Target</u>	<u>Price Target</u>	
10			<u>Catalysts</u>	<u>Catalysts</u>	
11			<u>Earnings Estimates</u>	<u>Earnings Estimates</u>	
12			<u>Quotes Options</u>	<u>Quotes Options</u>	
13			<u>Comparison</u>	<u>Comparison</u>	
14			<u>Price History</u>	<u>Price History</u>	
15			<u>Company Events</u>	<u>Company Events</u>	
16			<u>MF Calculator</u>	<u>MF Calculator</u>	
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					

### HiperLynk to Web Services Wizard

Select the range with company symbols

Select the cell to paste the results

Options

All

Fundamentals     Chart

News     Competitors

Stock Rating     Price Target

Catalysts     Earnings Estimates

Quotes Options     Comparison

Price History     Company Events

Mutual Funds Calculators

Paste in

Rows     Columns

### Note:

Data Source

<http://moneycentral.msn.com/investor/home.asp>

<http://finance.yahoo.com/>

<http://bigcharts.marketwatch.com/default.asp?siteid=&avatar=seen&dist=ctbc>

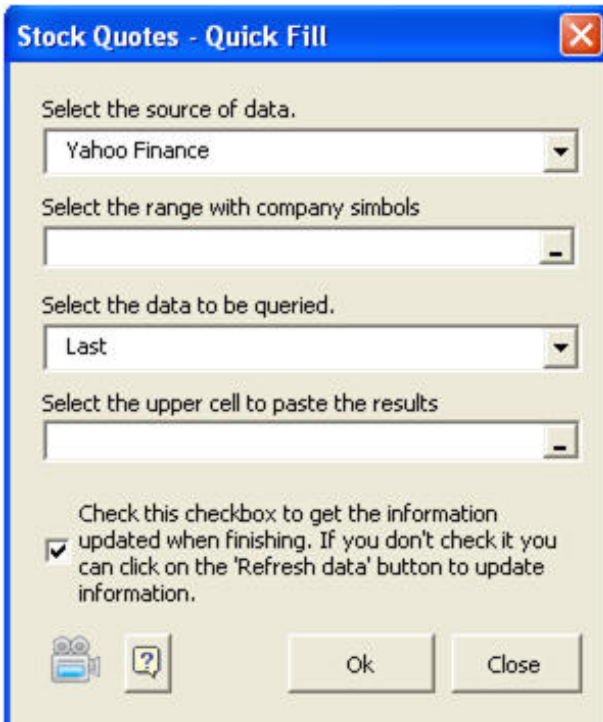


## Stock Quotes - Quick fill

Use this functionality to quickly fill a column with the data queried. You can choose from which source you want to get the information from -MSN Money or Yahoo! Finance.

You can select a range of cells containing the ticker symbols queried, and get any data item you want, depending on which data source you chose.

This tool also inserts the SQ( ) or SQY( ) functions if you have selected, if you have selected MSN Money or Yahoo! Finance as your data source, respectively.




The checkbox at the bottom is checked by default. If you do not uncheck it, all data will be automatically updated when you are finished; i.e. Stock Quotes will update the information.

**Note:** If you uncheck this checkbox, some cells may show error messages. Click on the Refresh Data button to update all data.



## Insert latest refresh (Date and Time)

Use Insert latest refresh (date and time) to insert the latest date and time when the data was updated . To do this, select a cell and then press  button to insert the latest refresh.

## Refresh Settings

With this functionality you can configure data refreshing options.

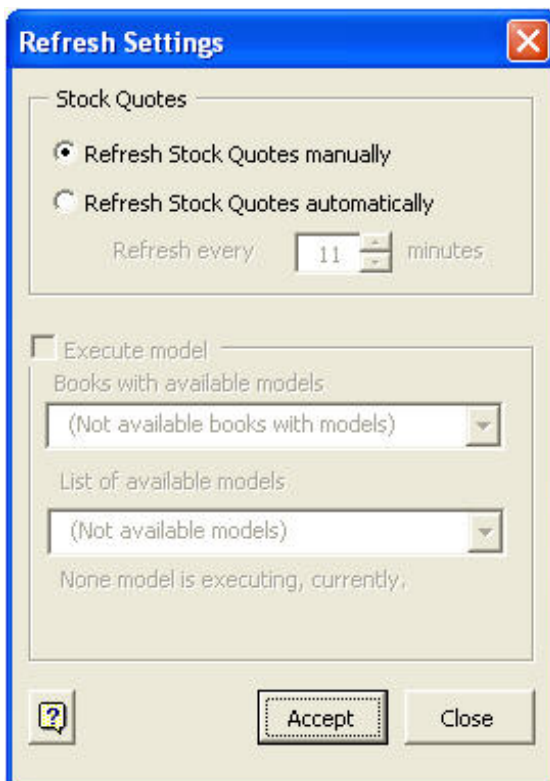
You can choose manual or automatic refreshing.

If you select manual, then you will have to click the Refresh Data button yourself to refresh your data.

If you select automatic, define the settings for the time interval between each automatic refreshing.

The minimum time interval is 10 minutes.

If you need to refresh you data more frequently, then select manual and click the "Refresh Data" button on the toolbar as frequently as required.



In the **Execute model** section, you can define the settings so that every time the data is refreshed, Stock Quotes will also run the model created with the Multiple Conditional Analysis & Formatting tool every time the data is refreshed. With that tool you can create formatting models that change cell and text colors based on a decision table.

### Multiple Conditional Analysis & Formatting

**Note:** If you want the refreshing time to be shorter, for example, 2 minutes, please feel free to write to JABSOFT at <http://www.jabsoft.net/helpdesk/>

We would send you an add-in with this characteristics, provided you query only a few ticker symbols, no more than 200.







## Available Information

Function	What data recovery?	Parameters	Data source	data_type
=SQ("symbol","data_type")	Stock prices Mutual funds	<i>symbol:</i> e.g. <b>IBM</b>  <i>data_type</i> e.g. <b>Last</b>	MSN Money Central Investor	Last Previous Close High Low Volume Change % Change 52 Wk High 52 Wk Low Market Cap EPS P/E Ratio #Shares Out
=QY("symbol","data_type")	Stock prices	<i>symbol:</i> e.g. <b>IBM</b>  <i>data_type</i> e.g. <b>Last</b>	Yahoo Finance	Last Trade Time Change % Change Volume Average Daily Volume Last Trade Date Previous Close Open High Low 52 Wk Low 52 Wk High Change From 52-week Low Change From 52-week High % Change 52-week Low % Change 52-week High Short Ratio Earnings/Share P/E Ratio Ex-Dividend Date Dividend/Share Dividend Yield Market Cap Book Value Price/Book Price/Sales EBITDA 1-Yr Target Price EPS Est. Current Year EPS Est. Next Year EPS Est. Next Quarter Price/EPS Est. Current Year Price/EPS Est. Next Year PEG Ratio 50-day Moving Average Change From 50-day Moving Average % Change From 50-day Moving Average 200-day Moving Average Change From 200-day Moving Average % Change From 200-day Moving Average

=INDEX("symbol","data_type")  e.g. =INDEX("SNL:ABX","Last") =INDEX("SFR:CAC","Previous Close") =INDEX("SINX","High") =INDEX("SINDU","Low")	Indices	Available indices ABX (Amsterdam) All Ordinaries (Sydney) ATTRACT40 (Stockholm) CAC-40 (Paris) DAX (Frankfurt) FTSE (London) Hang Seng (Hong Kong) Ibx35 (Madrid) Mib30 (Milan) Nikkei 225 (Tokyo) Straits Times Industrials (Singapore) TSE 300 (Toronto) Amex Eurotop 100 Amex Hong Kong Amex Japan Amex Mexico WEBS Australia WEBS Austria WEBS Belgium WEBS Canada WEBS France WEBS Germany WEBS Hong Kong WEBS Italy WEBS Japan WEBS Malaysia WEBS Mexico WEBS Netherlands WEBS Singapore WEBS Spain WEBS Sweden WEBS Switzerland WEBS United Kingdom DOW JONES INDUSTRIAL AVERAGE INDEX DOW JONES COMPOSITE INDEX DOW JONES TRANSPORTATION AVERAGE IND DOW JONES UTILITIES INDEX Frankfurt DAX SFTSE Hong Kong Hang Seng AMEX INTERACTIVE WEEK INTERNET INDEX NASDAQ COMPOSITE INDEX Nikkei225 CAC 40 PHLX SEMICONDUCTOR SECTOR INDEX RUSSELL 2000 STOCK INDEX S&P 100 INDEX S&P 500 INDEX SUNTRUST BANKS Sydney All Ordinaries Index Amex Gold BUGS Index Amex Biotechnology Index Amex Computer Technology Index Amex Disk Drive Index Amex Natural Gas Index Amex Networking Index Amex North American Telecommunications Index Amex Oil Index Amex Pharmaceutical Index Amex Securities Broker/Dealer Index Amex Tobacco Index Dow Jones Transports Dow Jones Utilities Inter@active Week Internet Index Morgan-Stanley Commodity Related Equity Index Morgan-Stanley Consumer Index Morgan-Stanley Cyclical Index Morgan-Stanley Health Care Payor Index Morgan-Stanley High Tech 35 Index PHLX Semiconductor Index DOW JONES INDUSTRIAL AVERAGE INDEX DOW JONES TRANSPORTATION AVERAGE IND DOW JONES UTILITIES INDEX S&P 500 INDEX S&P 100 INDEX S&P MIDCAP 400 INDEX NASDAQ-100 INDEX NASDAQ COMPOSITE INDEX AMEX COMPOSITE INDEX RUSSELL 1000 INDEX RUSSELL 2000 INDEX S&P BARRA VALUE INDEX S&P BARRA GROWTH INDEX	MSN Money Central Investor	Last Previous Close High Low Volume Change % Change 52 Wk High 52 Wk Low Market Cap EPS P/E Ratio #Shares Out

<p>=INDEX("symbol", "data_type")</p> <p>e.g.        =Index("^DJA", "Last")        =Index("^DJI", "Trade Time")        =Index("^XIC", "Open")        =Index("^FTSE", "Low")</p>	<p>Indices</p>	<p><u>Available indices</u></p> <p>DOW JONES COMPOSITE INDEX ^DJA        DOW JONES INDUSTRIAL AVERAGE IN ^DJI        DOW JONES TRANSPORTATION AVERAGE ^DJT        Dow Jones Utility Average ^DJU        NYSE COMPOSITE INDEX (NEW METHO ^NYA        NYSE International 100 ^NIN        NYSE TMT ^NTM        NYSE US 100 ^NUS        NYSE World Leaders ^NWL        NYSE Volume in 000's ^TV.N        NASDAQ BANK ^IXBK        NASDAQ BIOTECHNOLOGY (DRM) ^NEI        NASDAQ COMPOSITE ^XIC        NASDAQ COMPUTER ^IXK        NASDAQ FINANCIAL 100 ^IXF        NASDAQ INDUSTRIAL ^IXID        NASDAQ INSURANCE ^IXIS        NASDAQ NNM COMPOSITE ^IXQ        NASDAQ OTHER FINANCE ^IXFN        NASDAQ TELECOMMUNICATIONS ^IXUT        NASDAQ TRANSPORTATION ^IXTR        NASDAQ-100 (DRM) ^NDX        NASDAQ Volume in 000's ^TV.O        S&amp;P 100 INDEX, RTH ^OEX        S&amp;P 400 MIDCAP INDEX ^MID        S&amp;P 500 INDEX, RTH ^GSPC        S&amp;P COMPOSITE 1500 INDEX ^SPSPX        S&amp;P SMALLCAP 600 INDEX ^SML        AMEX COMPOSITE INDEX ^XAX        AMEX INTERACTIVE WEEK INTERNET ^IIX        AMEX NETWORKING INDEX ^NWX        ArcaEx Tech 100 Index ^PSE        DJ WILSHIRE 5000 TOT ^DWC        MAJOR MARKET INDEX ^XMI        PHLX SEMICONDUCTOR SECTOR INDEX ^SOXX        PHLX THESTREET.COM INTERNET SEC ^DOT        RUSSELL 1000 INDEX ^RUI        RUSSELL 2000 INDEX ^RUT        RUSSELL 3000 INDEX ^RUA        10-YEAR TREASURY NOTE ^TNX        13-WEEK TREASURY BILL ^IRX        30-YEAR TREASURY BOND ^TYX        5-YEAR TREASURY NOTE ^FVX        MerVal ^MERY        Boves pa ^BVSP        S&amp;P TSX Composite ^GSPSTE        IPC ^IPX        All Ordinaries ^AORD        Shanghai Composite ^SSEC        Hang Seng ^HSI        ESE 30 ^ESEN        Jakarta Composite ^JKSE        KLSE Composite ^KLSE        Nikkei 225 ^N225        NZSE 50 ^NZ50        Straits Times ^STI        Seoul Composite ^KS11        Taiwan Weighted ^TWII        ATX ^ATX        BEL-20 ^BFX        CAC 40 ^FCHI        DAX ^GDAXI        AEX General ^AEX        OSE All Share ^OSEAX        MIBTel ^MIBTEL        ISE National-100 ^IXX        Madrid General ^SMGI        Stockholm General ^OMWSP1        Swiss Market ^SSMI        FTSE 100 ^FTSE        CMA ^CCSI        TA-100 ^TA100</p>	<p>Yahoo Finance</p>	<p>Last        Trade Time        Change        % Change        Volume        Average Daily Volume        Last Trade Date        Previous Close        Open        High        Low        52 Wk Low        52 Wk High</p>
<p>=SQByDate("symbol", "mm/dd/yyyy", "data_type")</p> <p>e.g.        =SQByDate("MSFT", "6/28/2007", "Close")</p>	<p>Historical prices</p>	<p><u>Symbol:</u>        e.g. <i>MSFT</i></p> <p><u>data_type</u>        e.g. <i>Close</i></p>	<p>Yahoo Finance</p>	<p>Open        High        Low        Close        Volume        Adj Close</p>
<p>=SQByDate2("symbol", "mm", "dd", "yyyy", "data_type")</p> <p>e.g.        =SQByDate2("MSFT", "6", "28", "2007", "Close")</p>	<p>Historical prices</p>	<p><u>Symbol:</u>        e.g. <i>MSFT</i></p> <p><u>data_type</u>        e.g. <i>Open</i></p>	<p>Yahoo Finance</p>	<p>Open        High        Low        Close        Volume        Adj Close</p>
<p>=SQOP("symbol", "data_type")</p> <p>e.g.        =SQByDate2("MSFT", "6", "28", "2007", "Close")</p>	<p>Option prices</p>	<p><u>Symbol:</u>        e.g. <i>IBM100619000125000</i>  <i>MSFT100619000020000</i>  <i>XOM100619000067500</i></p> <p><u>data_type</u>        e.g. <i>Last</i></p>	<p>Yahoo Finance</p>	<p>Last        Trade Time        Change        % Change        Previous Close        Open        Bid        Ask        Low        High        Contract Low        Contract High        Volume        Open Interest        Strike        Expire Date</p>





## Data Downloader

Use this tool to download historical data of stock prices.

Select the cells containing the companies' ticker symbols, enter the range of dates, and the time intervals of the data -daily, weekly, or monthly- within that period. You can also find out your profit.

Optionally, you can choose a type of chart so you can plot the downloaded historical data.

The chart will help you visually to understand better and faster past information related to the queried companies.

With this tool you can also download Financial Statements from the web: Cash Flow, Balance Sheet, Income Statement, and 10-Year Summary.

The first spreadsheet shows the result of a query for historical prices from Yahoo! Finance.

The second spreadsheet shows Financial Statements from MSN Money.

The date format is MM/DD/YY

**Data Downloader**

Select the range with company symbols

Download Historic Data

Start date: 6/23/2008 .. End date: 6/23/2008 ..

Daily  Weekly  Monthly  Dividends Only

Line: [Line Chart 1] [Line Chart 2]

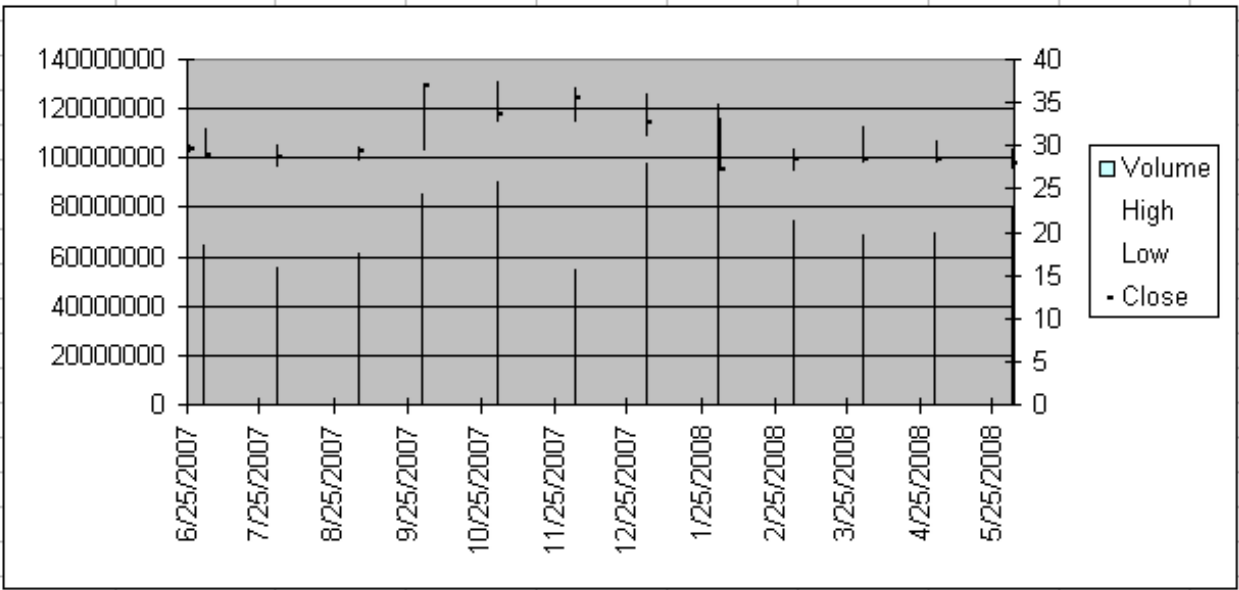
Stock: [Stock Chart 1] [Stock Chart 2] [Stock Chart 3]



Download Financial Statements

Cash Flow  Income Statement

Balance Sheet  10 Year Summary

	A	B	C	D	E	F	G	H	I
1	Date	Volume	Open	High	Low	Close	Adj Close		
2	6/25/2007	68831500	29.47	29.97	29.04	29.47	29.05		
3	7/2/2007	64862000	29.67	31.84	28.95	28.99	28.58		
4	8/1/2007	55264800	28.95	30.1	27.51	28.73	28.42		
5	9/4/2007	61223000	28.5	29.85	28.27	29.46	29.14		
6	10/1/2007	85080900	29.46	37	29.29	36.81	36.41		
7	11/1/2007	90498800	36.53	37.5	32.68	33.6	33.35		
8	12/3/2007	55002300	33.5	36.72	32.63	35.6	35.33		
9	1/2/2008	97806800	35.79	35.96	31.04	32.6	32.35		
10	2/1/2008	122053500	31.06	33.25	27.02	27.2	27.1		
11	3/3/2008	74958500	27.24	29.59	26.87	28.38	28.28		
12	4/1/2008	69066000	28.83	32.1	27.93	28.52	28.42		
13	5/1/2008	69931800	28.5	30.53	27.95	28.32	28.32		
14	6/2/2008	80606600	28.24	29.57	27.11	27.97	27.97		

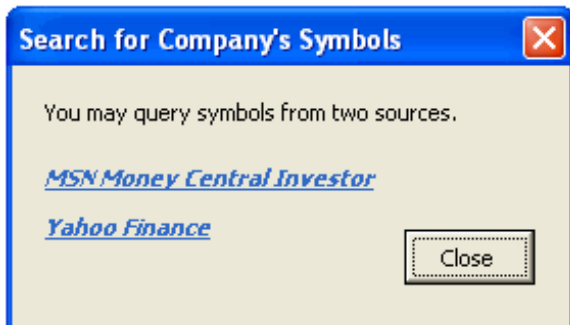


	A	B	C	D	E	F
1				Financial data in U.S. Dollars		
2				Values in Millions (Except for per share items)		
3						
4		2007	2006	2005	2004	2003
5	Period End Date	06/30/2007	06/30/2006	06/30/2005	06/30/2004	06/30/2003
6						
7	Stmt Source	10-K	10-K	10-K	10-K	10-K
8	Stmt Source Date	08/03/2007	08/25/2006	08/26/2005	08/26/2005	09/01/2004
9	Stmt Update Type	Updated	Updated	Updated	Restated	Restated
10						
11	<b>Assets</b>					
12	Cash and Short Term Investments	23,411.00	34,161.00	37,751.00	60,592.00	49,048.00
13	Cash & Equivalents	6,111.00	6,714.00	4,851.00	14,304.00	6,438.00
14	Short Term Investments	17,300.00	27,447.00	32,900.00	46,288.00	42,610.00
15	Total Receivables, Net	11,338.00	9,316.00	7,180.00	5,890.00	5,196.00
16	Accounts Receivable - Trade, Net	11,338.00	9,316.00	7,180.00	5,890.00	5,196.00
17	Accounts Receivable - Trade, Gross	11,455.00	9,458.00	7,351.00	6,056.00	5,438.00
18	Provision for Doubtful Accounts	-117	-142	-171	-166	-242
19	Total Inventory	1,127.00	1,478.00	491	421	640
20	Prepaid Expenses	0	0	0	0	0
21	Other Current Assets, Total	4,292.00	4,055.00	3,315.00	3,663.00	4,089.00
22	<b>Total Current Assets</b>	<b>40,168.00</b>	<b>49,010.00</b>	<b>48,737.00</b>	<b>70,566.00</b>	<b>58,973.00</b>
23						
24	Property/Plant/Equipment, Total - Net	4,350.00	3,044.00	2,346.00	2,326.00	2,223.00
25	Goodwill, Net	4,760.00	3,866.00	3,309.00	3,115.00	3,128.00
26	Intangibles, Net	878	539	499	569	384
27	Long Term Investments	10,117.00	9,232.00	11,004.00	12,210.00	13,692.00
28	Note Receivable - Long Term	0	0	0	0	0
29	Other Long Term Assets, Total	2,898.00	3,906.00	4,920.00	5,582.00	3,332.00
30	Other Assets, Total	0	0	0	0	0
31	<b>Total Assets</b>	<b>63,171.00</b>	<b>69,597.00</b>	<b>70,815.00</b>	<b>94,368.00</b>	<b>81,732.00</b>
32						
 <span>msft-Balance Sheet / msft-Cash Flow /</span> 						



## Search for company's Symbols

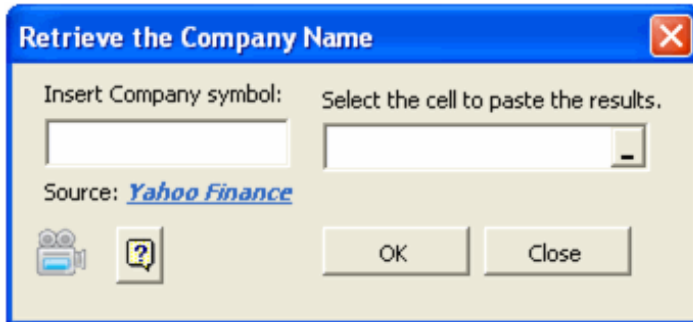
With this tool, you can have direct access to MSN Money and Yahoo! Finance websites to check for company ticker symbols.





## Retrieve the Company Name

With this tool you can retrieve the name of a company entering the appropriate ticker symbol.



Retrieve the Company Name

Insert Company symbol:

Select the cell to paste the results.

Source: [Yahoo Finance](#)

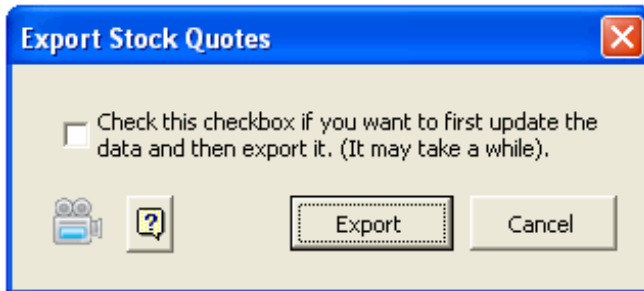
OK Close

The data source is Yahoo! Finance.

If you want to check for company ticker symbols, use the [Search for Company's Symbols tool](#).

## Export Stock Quotes

Use this tool to get the Add-in to export retrieved stock and mutual fund data to a new Excel book,



If you check the box, the information will be first updated and then exported, but it will naturally take a while, depending on the volume of information queried.

Since we have two possible data sources, i.e. MSN Money and Yahoo! Finance, this tool will export data from both sources.

**Note:**

Do not worry if there is a blank sheet in the new book while exporting: this happens because no data is currently being queried from either of both sources, MSN Money or Yahoo! Finance.

## Export Market Indexes

Use this tool to export stock market index data from with the Add-In from either of both data sources, Yahoo! Finance or MSN Money



If you check the box, all stock market index data will updated and then exported to a new Excel book.

Do not worry if there is a blank sheet in the new book while exporting: this happens because no stock market index data is currently being queried from either of both sources, MSN Money or Yahoo! Finance.



## Export Sheet Values

Your active spreadsheet works with formulas. With this tool you can create a new book with values rather than formulas.

This may be useful, for example, when you need to email stock prices to somebody.

If you sent the active sheet with Stock Quotes formulas, the recipient could not see the quotes unless he had Stock Quotes installed.



## Cell's math by format

Use this gainful tool to search all cells in a specific range with a particular background color and to do some math with the results.

The following database will be used to explain the way this advantageous tool works (link to the database)

These are the steps:

If you wish, include the active cell in the target range, so that the cells surrounding the active cell become the target range.

- ✓ Click on the the Cell's Math By Format button in the toolbar.
- ✓ Select the target range and the mathematical operation you wish to do:

	A	B	C	D	E	F
1						
2		Year	First name			
3		2004	Chris			
4		2004	Ellen			
5		2005	George			
6		2002	James			
7		2002	Jean			
8		2002	Joe			
9		2002	John			
10		2001	Mary			
11		2001	Max			
12		2001	Rachel			
13		2001	Paula			
14		2003	Peter			
15		2003	Sadie			
16		2002	Sam			
17		2001	Samantha			

**Cell's math by format**

Select the target range :  Select a math action :

Select a range with the colors to evaluate :

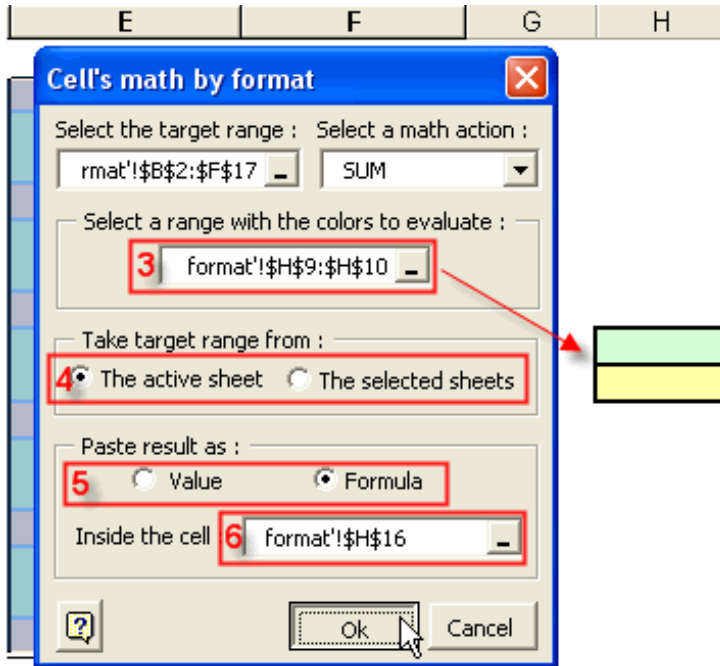
Take target range from :  The active sheet  The selected sheets

Paste result as :  Value  Formula

Inside the cell :

Ok Cancel

- ✓ Select the range containing the colors to be searched.
- ✓ Decide which sheets contain the same range to be searched.
- ✓ The results may be pasted either as values or as formulas. Try for yourself.
- ✓ Select the cell(s) you want to paste the results in.



### Observation:

Excel doesn't allow to create formulas that contains too many characters. If the operation's result, that you executed, thrown excessive characters, then Cell's math by format will inform you, and it, optionally, let you to paste the results of your operation, but only as values. This is a good alternative.



- Then click the "Refresh data" button to refresh all data retrieved.

	A	B	C	D	E	F	G	H
1	Symbol	Stock Quotes	# Of Stocks	Total Price				
2	aaa	26.09	4	104.36				
3	ace	56.24	5	281.2				
4	aai	2.23	6	13.38				
5	aap	39.56	3	118.68				
6	aar	13.98	4	55.92				
7	aau	1.84	8	14.72				
8	aav	12.6	5	63				
9	abb	28.26	4	113.04				
10	abc	39.23	3	117.69				
11	abd	11.86	5	59.3				
12	abg	13.29	4	53.16				
13	abi	33.18	5	165.9				
14	abk	1.82	6	10.92				
15								
16								
17								

- Open the **Multiple Conditional Analysis & Formatting** dialog box, and select the table as shown in the screenshot:

	A	B	C	D	E	F	G	H	I	J
1	Symbol	Stock Quotes	# Of Stocks	Total Price						
2	aaa	26.09	4	104.36						
3	ace	56.24	5	281.2						
4	aai	2.23	6	13.38						
5	aap	39.56	3	118.68						
6	aar	13.98	4	55.92						
7	aau	1.84	8	14.72						
8	aav	12.6	5	63						
9	abb	28.26	4	113.04						
10	abc	39.23	3	117.69						
11	abd	11.86	5	59.3						
12	abg	13.29	4	53.16						
13	abi	33.18	5	165.9						
14	abk	1.82	6	10.92						
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										

**Multiple conditional analysis & formatting** ✕

Execute existing models: (Not available models) ▾

New Model

Model name: Description:

(without comments)

Save model Cancel

---

Select the database (including headers):

Sheet1!\$A\$1:\$D\$14 Do it

Cell with field name to evaluate: Paste Decision table example

Decision table (including headers): Close

Format the column under observation.  Add a categorie field.

Advanced Options

Add Summary  Add Pivot Table

Fields >>



- Click on the **Paste Decision Table Example** button to insert an example decision table, which you can then edit as required. as required. Choose the items as shown in the following figure:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Symbol	Stock Quotes	# Of Stocks	Total Price								
2	aaa	26.09	4	104.36								
3	ace	56.26	5	281.3								
4	aai	2.23	6	13.38								
5	aap	39.58	3	118.74								
6	aar	13.96	4	55.84								
7	aau	1.84	8	14.72								
8	aav	12.63	5	63.15								
9	abb	28.34	4	113.36								
10	abc	39.28	3	117.84								
11	abd	11.85	5	59.25								
12	abg	13.32	4	53.28								
13	abi	33.22	5	166.1								
14	abk	1.82	6	10.92								
15												
16												
17												
18			>=	<=	Category							
19			0	3	Very low							
20			4	6	Low							
21			7	9	Normal							
22			10	12	High							
23			13	16	Very high							
24												
25												
26												

**Multiple conditional analysis & formatting**

Execute existing models: (Not available models)

New Model  
 Model name: Description:  
 (without comments)

Save model Cancel

---

Select the database (including headers):  
 Sheet1!\$A\$1:\$D\$14 Do it

Cell with field name to evaluate:  
 Sheet1!\$D\$1 Paste Decision table example

Decision table (including headers):  
 Sheet1!\$C\$18:\$E\$23 Close

Format the column under observation.  Add a categorie field.

Advanced Options  
 Add Summary  Add Pivot Table

Fields>>

- Check the "Add a category field" checkbox, and then the "Add Summary" and "Add Pivot Table" checkboxes. The latter are optional, but very useful, since the results you get when you run the model will be displayed in a summary matrix and a Pivot Table. Then click on the **Fields >>** button, and select a cell range as in the following screenshot. Then click **OK**.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Symbol	Stock Quotes	# Of Stocks	Total Price								
2	aaa	26.09	4	104.36								
3	ace	56.04	5	280.2								
4	aai	2.22	6	13.32								
5	aap	39.56	3	118.68								
6	aar	13.85	4	55.4								
7	aau	1.82	8	14.56								
8	aav	12.61	5	63.05								
9	abb	28.29	4	113.16								
10	abc	39.2	3	117.6								
11	abd	11.85	5	59.25								
12	abg	13.32	4	53.28								
13	abi	33.18	5	165.9								
14	abk	1.81	6	10.86								
15												
16												
17												
18			>=	<=	Category							
19			0	50	Very low							
20			51	100	Low							
21			101	150	Normal							
22			151	200	High							
23			201	1000	Very high							
24												

**Multiple conditional analysis & formatting**

Choose your preferences to generate the report:

Field	Operation	Number format
Total Price	SUM	Default
# Of Stocks	COUNT	Default

Ok Cancel



Furthermore, a pivot table has been created in other sheet with the previously defined criteria.

	A	B	C	D
1				
2				
3		Data		
4	Category	SUM OF TOTAL PRICE	COUNT OF # OF STOCKS	
5	High	165.9	1	
6	Low	230.98	4	
7	Normal	453.8	4	
8	Very high	280.2	1	
9	Very low	38.74	3	
10	Grand Total	1169.62	13	
11				
12				
13				

- To run this model automatically every time stock prices are updated, open the "Refresh Settings" dialog box and check the "Execute model" checkbox. Then select, from the appropriate drop-down menus, select the book where you saved the model and then the model itself.

**Note:** To enable the automatic execution of this model, first select "Refresh Stock Quotes automatically", and then enter the time interval between successive executions. Finally, click OK.

	A	B	C	D	E	F	G	H	I
1	Symbol	Stock Quotes	# Of Stocks	Total Price	Category				
2	aaa	26.09	4	104.36	Normal				
3	ace	56.04	5	280.2	Very high				
4	aai	2.22	6	13.32	Low				
5	aap	39.56	3	118.68	Normal				
6	aar	13.85	4	55.4	Normal				
7	aau	1.82	8	14.56	Normal				
8	aav	12.61	5	63.05	Normal				
9	abb	28.29	4	113.16	Normal				
10	abc	39.2	3	117.6	Normal				
11	abd	11.85	5	59.25	Normal				
12	abg	13.32	4	53.28	Normal				
13	abi	33.18	5	165.9	High				
14	abk	1.81	6	10.86	Normal				
15									
16									
17									
18			>=	<=					
19			0						
20			51						
21			101						
22			151						
23			201	1					
24									
25									

**Refresh Settings**

Stock Quotes

Refresh Stock Quotes manually

Refresh Stock Quotes automatically

Refresh every  minutes

Execute model

Books with available models:

List of available models:

None model is executing, currently.

Accept Close

**Note:** You can create any number of models following the above steps, but only one can be active for automatic execution.





## Select by Format

This tool selects cells of a given range, but only taking into account those with a given format.

Consider the following example:

Select all cells with pink background and white color font.

1. Click on the Specific cells button. The selected range will be automatically loaded, and may be modified.

	A	B	C	D	E	F	G	H	I	J
1										
2		<b>ID</b>	<b>Product name</b>	<b>Quantity</b>	<b>price</b>					
3		001	Coffee A	5167	\$10					
4		002	Tea A	5206	\$5					
5		003	Juice A	5245	\$9					
6		004	Coffee B	5322	\$10					
7		005	Tea B	5361	\$5					
8		006	Juice B	6666	\$9					
9		007	Coffee C	7777	\$10					
10		008	Tea C	8888	\$5					
11		009	Juice C	9999	\$9					
12		010	Coffee D	1010	\$11					
13		011	Tea D	5050	\$6					
14		012	Juice D	5089	\$10					
15		013	Coffee E	5128	\$12					
16		014	Tea E	5284	\$7					
17		015	Juice E	4816	\$4					
18		016	Coffee F	4933	\$15					
19		017	Tea F	4972	\$10					
20		018	Juice F	5011	\$7					
21		019	Coffee G	1234	\$5					
22		020	Tea G	2345	\$5					
23		021	Juice G	3456	\$5					
24		022	Coffee H	4777	\$10					
25		023	Tea H	2222	\$6					
26		024	Juice H	3333	\$9					
27										

### Select by Format

Choose the range to evaluate:  
SHEET1!\$B\$2:\$E\$26

Cell with the format to evaluate:  
SHEET1!\$E\$19

Considering:

- Number format.
- Font size.
- Font type.
- Font bold.
- Font color.
- Horizontal alignment.
- Vertical alignment.
- Cell's color.

Buttons: Ok, Cancel

The result is shown below:

	A	B	C	D	E	F
1						
2		<b>ID</b>	<b>Product name</b>	<b>Quantity</b>	<b>price</b>	
3		001	Coffee A	5167	\$10	
4		002	Tea A	5206	\$5	
5		003	Juice A	5245	\$9	
6		004	Coffee B	5322	\$10	
7		005	Tea B	5361	\$5	
8		006	Juice B	6666	\$9	
9		007	Coffee C	7777	\$10	
10		008	Tea C	8888	\$5	
11		009	Juice C	9999	\$9	
12		<b>010</b>	<b>Coffee D</b>	<b>1010</b>	<b>\$11</b>	
13		<b>011</b>	<b>Tea D</b>	<b>5050</b>	<b>\$6</b>	
14		<b>012</b>	<b>Juice D</b>	<b>5089</b>	<b>\$10</b>	
15		013	Coffee E	5128	\$12	
16		014	Tea E	5284	\$7	
17		015	Juice E	4816	\$4	
18		016	Coffee F	4933	\$15	
19		017	Tea F	4972	\$10	
20		018	Juice F	5011	\$7	
21		019	Coffee G	1234	\$5	
22		020	Tea G	2345	\$5	
23		021	Juice G	3456	\$5	
24		022	Coffee H	4777	\$10	
25		023	Tea H	2222	\$6	
26		024	Juice H	3333	\$9	
27						

You may select any format you wish. It's super intuitive.





## Toggle Settings

We often lose valuable time doing repetitive tasks -if, for example, we want to hide the headings in several sheets of the Workbook, we will have to do it one at a time.

This powerful tool has been created to do away with such loss of time.

Advantages include:

### Same upper -left cell in all

Let's say you are working in a workbook with 50 sheets and you wish to view the value in the R200 cell of each. It would be a dreary task having to navigate through all worksheets and locate that specific cell in them all, wouldn't it?

With this tool, this would be as simple as:

- Locate yourself in any worksheet and select the cell to be checked.
- Press the Same upper -left cells in all button.

That's it. You will view that cell in all worksheets; the selected cell will be viewed the left upper corner.

As simple as 1-2!

### Reset Excel's last cells

This utility allows you to save only the part of each worksheet in use, meaning the section containing actual data or formatting.

It may happen that the last cell of a worksheet is beyond the range of your actual used data. This issue may cause you to have a larger file size than necessary, you may experience other unusual behavior.

Clear the excess rows and columns with Reset Excel's last cell and solve these issues.

And many configuration options more. Use this tool as best suits your convenience it's super-intuitive.

**Toggle settings** [X]

Reference style :

A1     R1C1

Calculation

Automatic

Automatic except tables

Manual

Iteration

Maximum Iterations:

Maximum Change:

Formula bar

Status bar

Tabs

Horizontal scrollbar

Vertical scrollbar

Gridlines

Page breaks

Headings


Zeros

Show formulas

Full screen

Comments

Show only indicator comments [v]



Apply this settings to all sheets.





## Freeze Panes

We sometimes work with models whose information does not fit in the screen. And we may get lost as we navigate throughout the spreadsheet as the headings of our model would no longer be visible.

### Divide panes

There may be portions of our worksheet we wish to view at all times. If so, separate those sections as locked portions of data that can be manipulated. This tool can help us in the process of creating, navigating through, editing excessively long models and keeping an eye on them.

Follow these steps:

**1st click** - Freeze Panes

**2nd click** - Divide Panes

**3rd click** – Undo Freeze / Divide Panes

	A	B	C	D	E
1					
2					
3					
4					
5					
6					
7					
8					

	A	B	C	D	E
1					
2					
3					
4					
5					
6					
7					
8					



## Guides

This tool is specially convenient if you want to navigate throughout databases with records or fields stretching beyond the screen.

Use this valuable tool to stay in the same record, regardless of the fact that column headings are no longer visible.

The following figure is only for illustrative purposes.

	A	B	C	D	E	F	G	H
1								
2								
3		<b>Year</b>	<b>First name</b>	<b>Last name</b>	<b>City</b>	<b>Gender</b>	<b>Birthday</b>	<b>Age</b>
4		2004	Chris	Sleep	Gastonia	M	12-08	29
5		2004	Ellen	Oaks	Raleigh	F	08-08	26
6		2005	George	Porge	Concord	M	06-05	31
7		2002	James	Doe	Charlotte	M	07-12	32
8		2002	Jean	Queen	Charlotte	M	09-01	45
9		2002	Joe	Jones	Raleigh	M	11-23	29
10		2002	John	Doe	Gastonia	M	12-30	23
11		2001	Mary	Contrary	Wilmington	F	04-23	45
12		2001	Max	Steel	Charlotte	F	05-28	35
13		2001	Rachel	Quispe	Charlotte	F	04-29	27
14		2001	Paula	Mann	Concord	M	02-29	19
15		2003	Peter	Holland	Maryland	F	03-22	32
16		2003	Sadie	Smith	Wilmington	F	03-09	21
17		2002	Sam	Pam	Raleigh	M	04-12	31
18		2001	Samantha	Bell	Gastonia	F	12-30	30

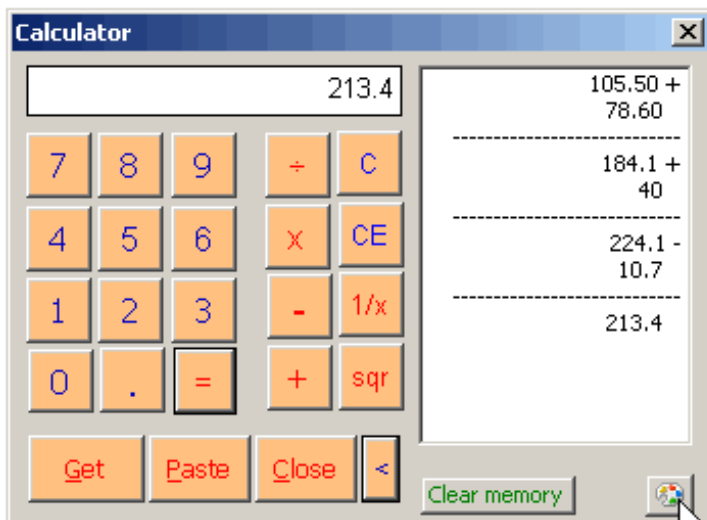


## Arithmetic Calculator

With her you can make arithmetic operations quickly from the selected cells and using its **GET** and **PASTE** buttons.

It has a useful tape that will show you the history of your calculations.  
Also you can manage it from your keyboard.

Simply click on the Arithmetic calculator button of the add-in menu bar.



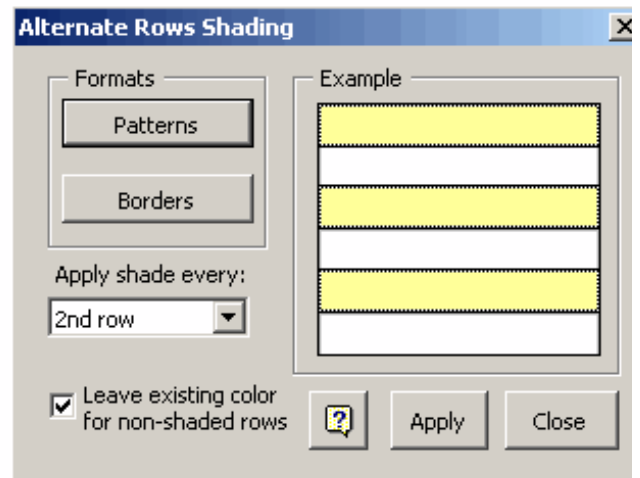
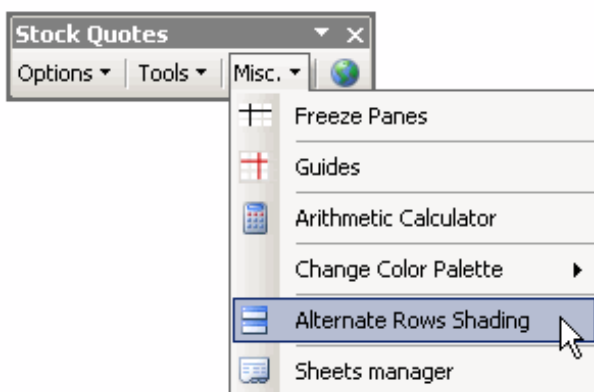
Buttons color



## Alternate Rows Shading

When you use this tool you will be able to format cells with a conditional format in an alternate basis, providing cell color and border formats.

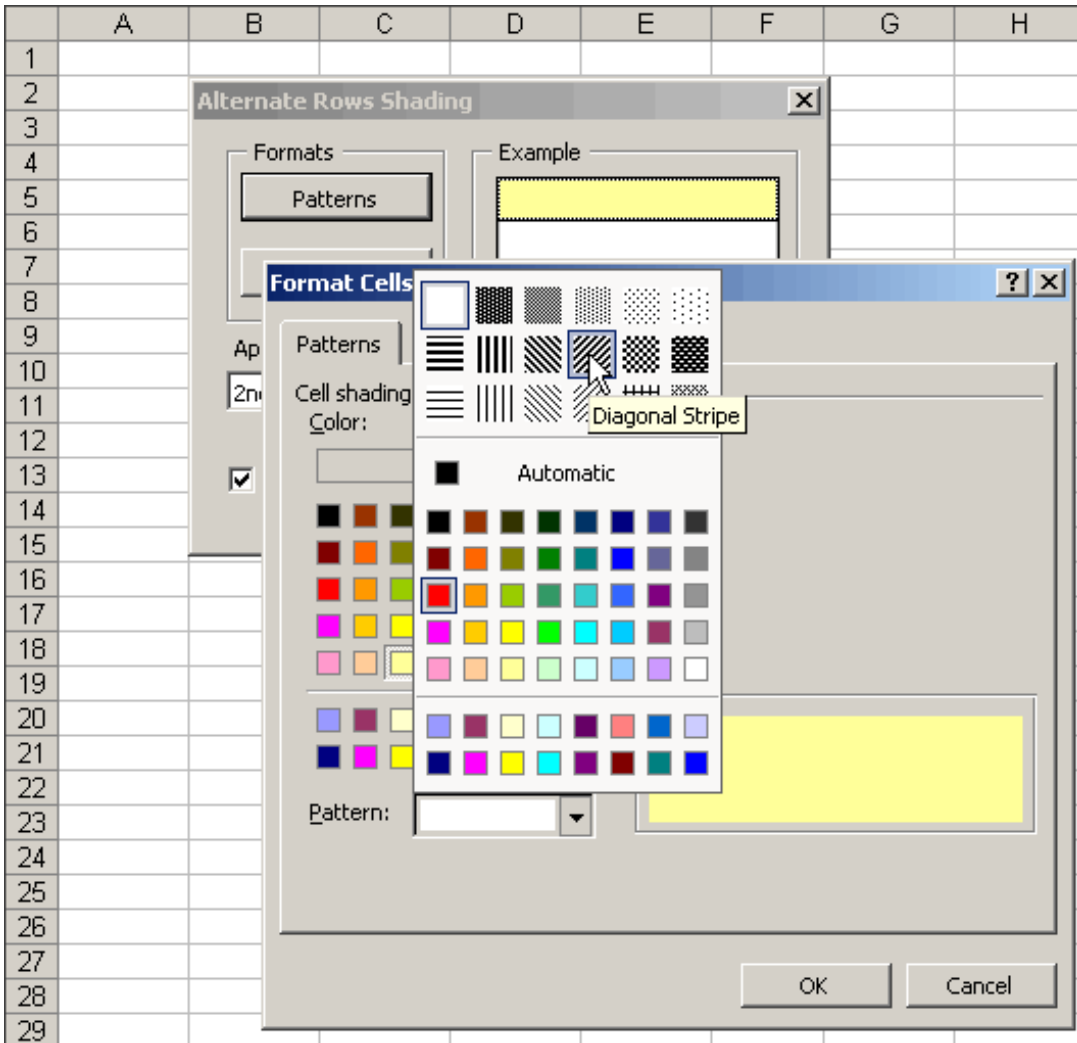
With this tool, it will no longer be a difficult or laborious task to have to add rows with formats, which are the same as those of preceding rows, since, by just adding new rows from Excel, the formats will be automatically added. You may add columns as rows with a personalized format.



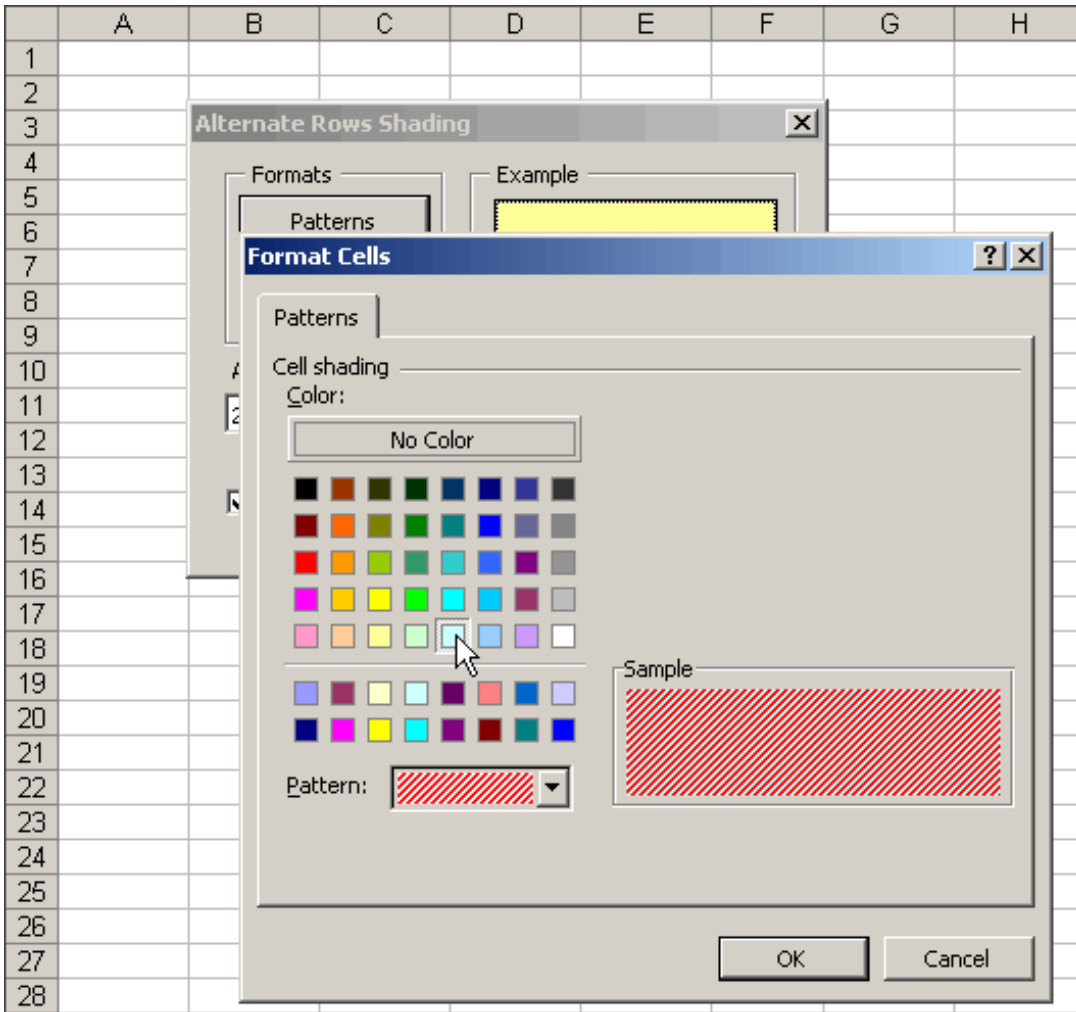
	A	B	C	D	E	F	G
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							

### Example

Open the configuration and application box, as shown in the previous image. Then click on the **Patterns** button and choose the configuration you see in the following image. First we will configure Patterns and their color.



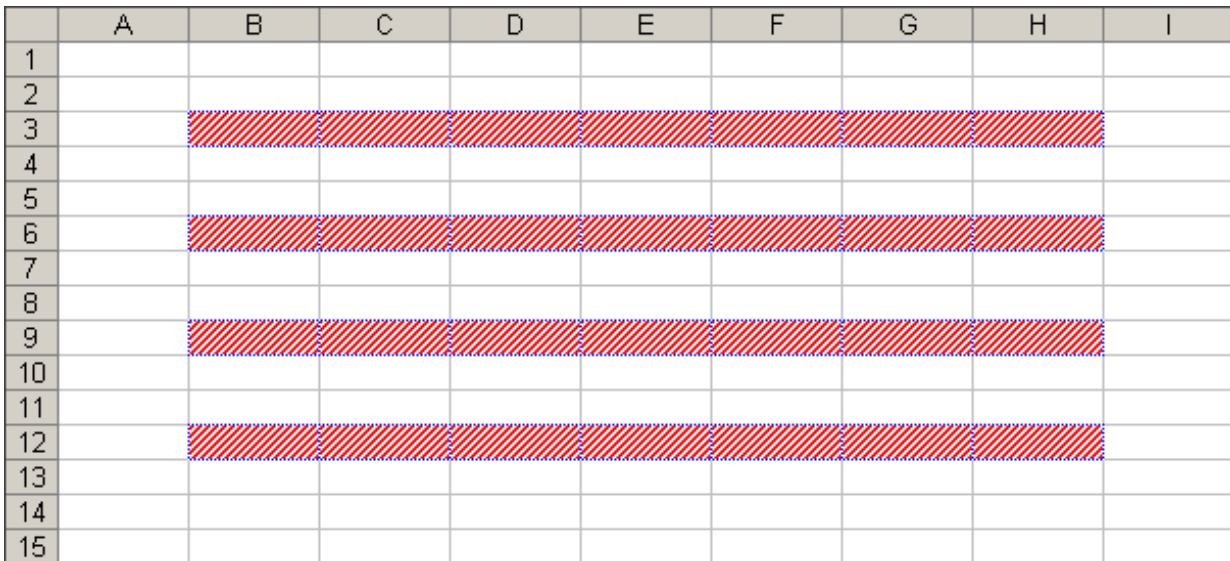
Accept your changes and choose a cell color. In our case, we choose Light Blue.



Click on the **OK** button.

Then choose the border you want. In the unfolding option choose the cells range you want the format to apply to: conditional, every two, three, four or five cells. In our case, it is every three cells.

Finally, choose the range to which you wish to apply the formats. Click on the Apply button, and you are done.

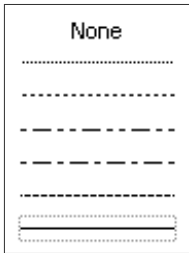


**Important note:**

In the tool's configuration box there is a Control Check, which is active by default.  
If it is active, it is because when the tool is applied the cell color will be left alone, so that it will not be affected by the intermediate lines,  
If you deactivate it, the tool will eliminate the colors.

**Remark:**

The following border types are supported by the tool:





## Sheets Manager

### **Your workbooks have so many sheets you find it hard to manage them?**

Use Sheet Manager –a comprehensive tool that will make any worksheet management task easier to you.

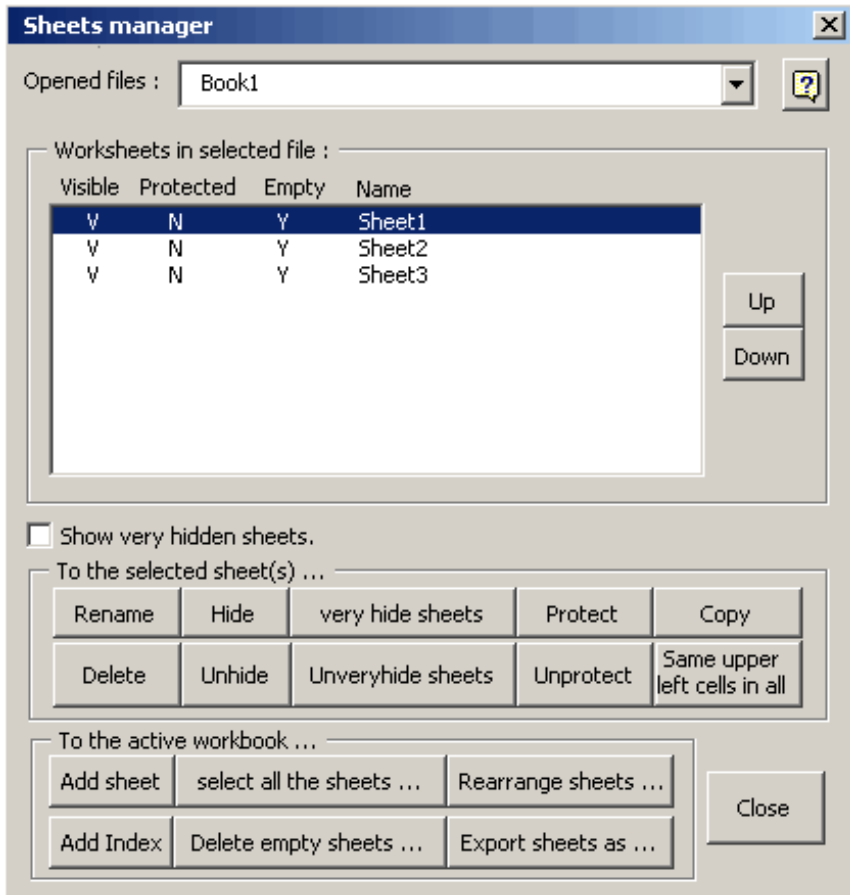
Sheets manager show a relation of all the sheets of your workbook, including hidden and the very hidden sheets, too describes the other properties to each one of them.

Thus you can quickly note which are protected with password or which are hidden.

Sheets manager helps you, of simple way, with the following actions:

- Export the selected sheets...
- Hide sheets.
- Unhide sheets
- To make the sheets very hidden
- To show to the very hidden sheets
- To protect sheets
- Unprotect sheets
- Rearrange sheets
- Delete all the empty sheets
- Generate a Index of all the existing sheets.
- Navigation between the sheets
- Add sheets
- Rename sheets
- Delete sheets.

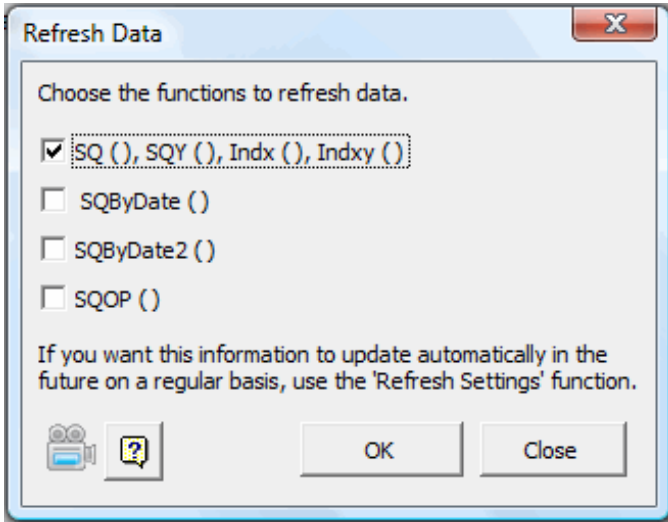






## Refresh Data

In this window you can choose the functions to refresh in order to download the values from Yahoo Finance y MSN Money





**Stock Quotes** For Excel

## Do you need more help?

- ✓ If you need help address to our HelpDesk (<http://www.jabsoft.net/helpdesk>)
- ✓ If you have comments or suggestions about Stock Quotes for Excel add-in, please contact us at: [support@jabsoft.com](mailto:support@jabsoft.com)

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