

Welcome to the Quick Start Guide for Kase OUTLOOK

Outlook is designed to generate technical forecasts on either a pre-defined portfolio of securities or a manually inputted list.

To Run an Outlook on a Portfolio

Kase Outlook has the ability to import and run analysis on portfolios that have been setup in PRTU <GO>. Before you can run analysis on a portfolio you must first set one up in PRTU <GO> and then define that portfolio in Kase Outlook by using the portfolios U-Number such as U1234567-1.

A. Define a Portfolio

1. Click Portfolio Library 
2. Click Add 
3. Fill "Name" and "Portfolio U-Number" fields then click "OK" (U-Number is found in PRTU <GO>)
4. Click "Done" 

B: Run an Outlook on a Portfolio

1. Click "Portfolio Outlook" 
2. Select a portfolio from the "Choose Portfolio" drop-down menu
3. Set "Sorting Options" from drop-down menus
4. Click the "Run Outlook" button

To Run a Forecast on a Custom List

A. Setup and Run an Outlook on the List

1. Click "Custom List Outlook" 
2. Enter each security you wish to run and click add button 
3. Repeat step three for up to 20 securities
4. To remove a security from the list select it and press the delete button 
5. Set "Sorting Options" from drop-down menus
6. Click "Run Outlook" button

The Initial Output of the forecast will be displayed in the Kase Outlook Dashboard and will be a list of the securities that meet the sort criteria, the probability of going up or down, and an arrow showing the direction of each security. For a description of the Dashboard items click on the "Dashboard Diagram" button in the lower left corner of the Dashboard view.

Calculating Probabilities and Targets

To generate the probabilities and targets for securities you are interested in check the box to the left of up to 10 securities and click the "Calculate Probabilities and Targets" button . To run additional securities, uncheck the ones you have already run, and check up to 10 new securities. Again click .

Rerunning Outlooks

If you wish to rerun the market direction and direction arrow only, check as many boxes to the left of the securities that you wish to run, and click the "Rerun Direction" button . To select or deselect all the securities click the "Select or Deselect All" button. 

To rerun targets and probabilities select up to 10 securities and click .

Sorting Security List

Clicking on the "Security" column will alphabetically sort the list. Clicking on the "Direction" column will sort all the outcomes, regardless as to direction, in terms of strength of trend value.

To rerun "Sorting Options", similar to the drop-down menu noted above, click the "Advanced Sort" button 

Viewing Background Technical Analysis

The targets and probabilities for each security are based on technical analysis. There is a "View Full Analysis" button below each security. To view the full analysis details click on the button for an individual security of interest.

Learn More

More information about Kase Outlook, including the manual and tutorial videos may be found at KASE <GO> or www.kaseco.com/bloomberg/outlook/. You may also access help files in Kase Outlook by pressing "Help"  at anytime.

Customer Support

If you have any questions you may call Customer Service at 505-237-1600. Support is offered Monday through Friday from 7:30 AM – 5:30 PM US Mountain Time, and in the evening by appointment. You may also reach support by emailing bbghelp@kaseco.com.