

Welcome to Kase Outlook



Kase Outlook Manual

Getting Started...

Kase Outlook provides the technical tools to identify market bias, pinpoint support and resistance, and determine the probability for meeting each of these levels. The application also allows users to scan portfolios and narrow the range of securities that have the best trading opportunities.

This manual shows you how to use all of the features and functionality of Kase Outlook. It will teach you about the app's functionality and show you how to set up and then run Kase Outlook on a portfolio setup in Bloomberg's PRTU <GO> function or a custom list of securities. It will also show you how to navigate the Kase Outlook Dashboard and view the details of a full analysis.

Learn More

Please use the Quick Start Guide the first time you use Kase Outlook for tips on getting started. It is also recommended that you read the Kase Outlook Manual for complete information on all of the features and functionality of this app. You can access help files in Kase Outlook by pressing Help [?] at anytime.

Additional Support

Please visit KASE <GO> or www.kaseco.com/bloomberg/outlook/ for more information, including:

- A PDF version of the Quick Start Guide
- Tutorial and training videos

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 MST.

You can also reach support by emailing bbghelp@kaseco.com.

Launching Kase Outlook

Kase Outlook is launched from APPS <GO> in Bloomberg

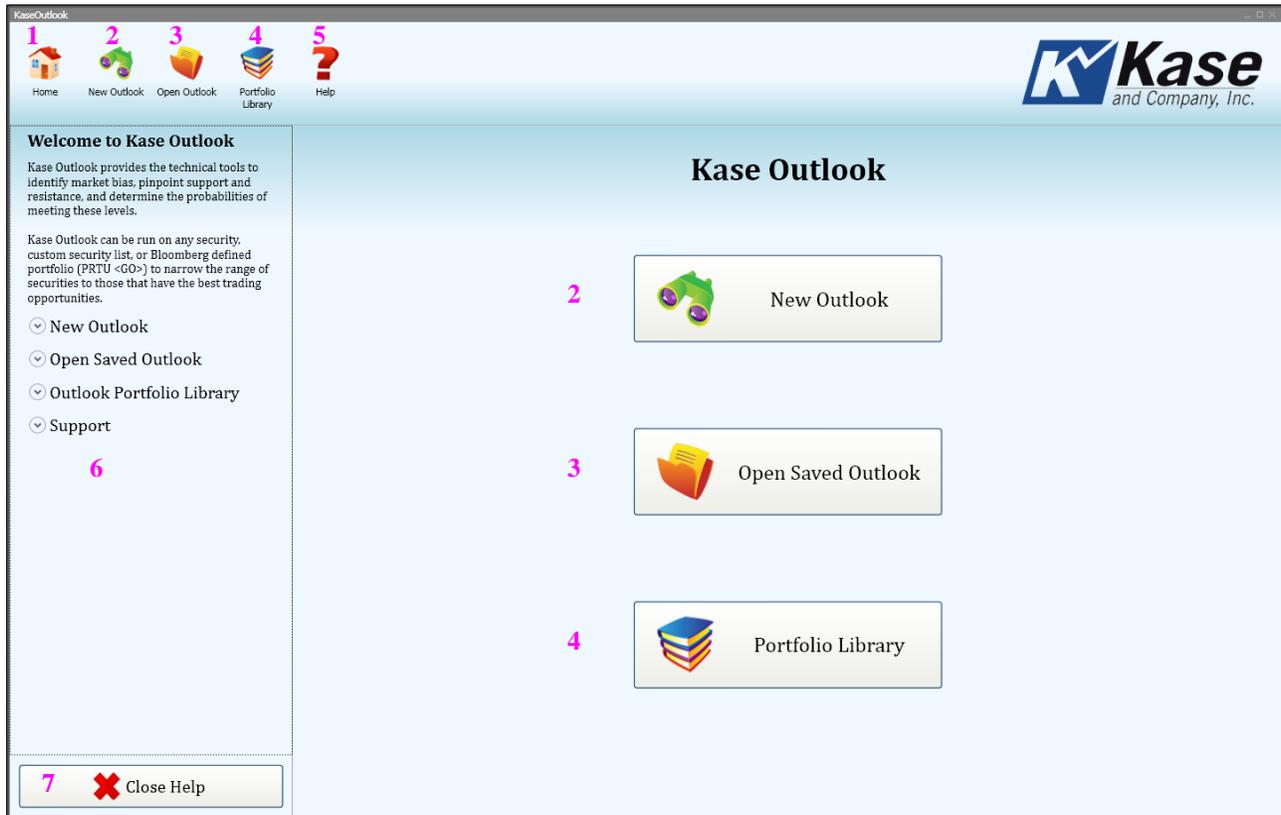
Click on “3) My Apps”

The screenshot shows the Bloomberg Application Portal interface. On the left, a navigation menu lists: 1) Featured, 2) Categories, 3) My Apps (highlighted with a pink box), and 4) What's New. The main content area is titled 'Featured Apps' and displays a grid of application cards. The card for '(Alpha) Kase Outlook' by KASE AND COMPANY INC is highlighted with a blue border. Below this, a 'Most Popular Apps' section shows icons for DeMark Service, ATM Studies by Capital M..., TAS PRO Intelligent Breakout..., Kase StatWare, and Phil Erlanger Research. A footer note states: 'The apps herein are created and supported by third-party vendors'.

Click on the “Kase Outlook Icon” on Title to Launch Kase Outlook

This screenshot shows the 'My Applications' section of the Bloomberg Application Portal. The title is 'My Applications (2 total)'. Two application cards are listed: 1) '(Alpha) Kase Outlook' by KASE AND COMPANY INC, with its icon highlighted by a pink box and a 'Cancel Subscription' button to its right. 2) 'Kase StatWare' by KASE AND COMPANY INC, also with a 'Cancel Subscription' button. A 'Share with colleagues' link is visible below each card. The left navigation menu remains the same, with '3) My Apps' selected. The footer note 'The apps herein are created and supported by third-party vendors' is also present.

Kase Outlook Home Screen



1. Home Button
Returns user to Home Screen
2. New Outlook
Used to Run a New Portfolio or Custom List Outlook
3. Open Saved Outlook
This function has not been implemented yet, but will eventually allow users to save and reopen saved outlook runs.
4. Portfolio Library
Used to define portfolios from PRTU <GO> for use within Kase Outlook.
5. Help Button
Can be pressed on any outlook view for help using that screen. Help is displayed on the left panel of Kase Outlook's display.
6. Help Contents
Contents of the help files are shown in the left display panel and are based upon the screen that is being viewed in the panel.
7. Close Help
Used to close the help file contents on the left panel.

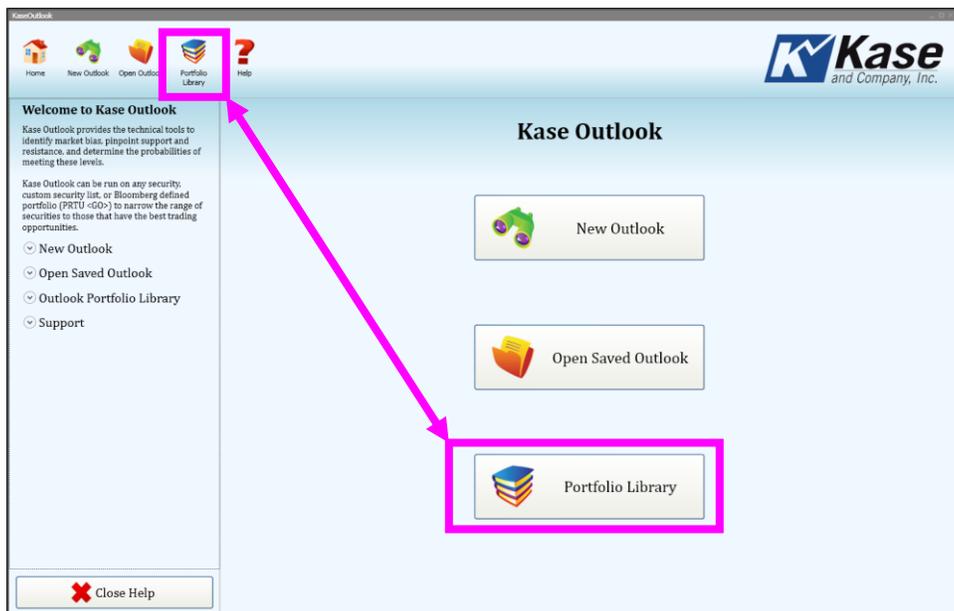
Define a Portfolio

Kase Outlook has the ability to run analyses on portfolios that have been defined in Bloomberg's PRTU <GO> function. To use the Portfolio Outlook option in Kase Outlook, a portfolio must be defined in PRTU <GO>. A portfolio must not contain more than 9999 securities.

The portfolio is referenced in Kase Outlook by a U-Number that is defined in PRTU <GO> (shown below). This U-Number can be seen in the upper right hand corner of the portfolio as shown in the magenta box in the screenshot below.

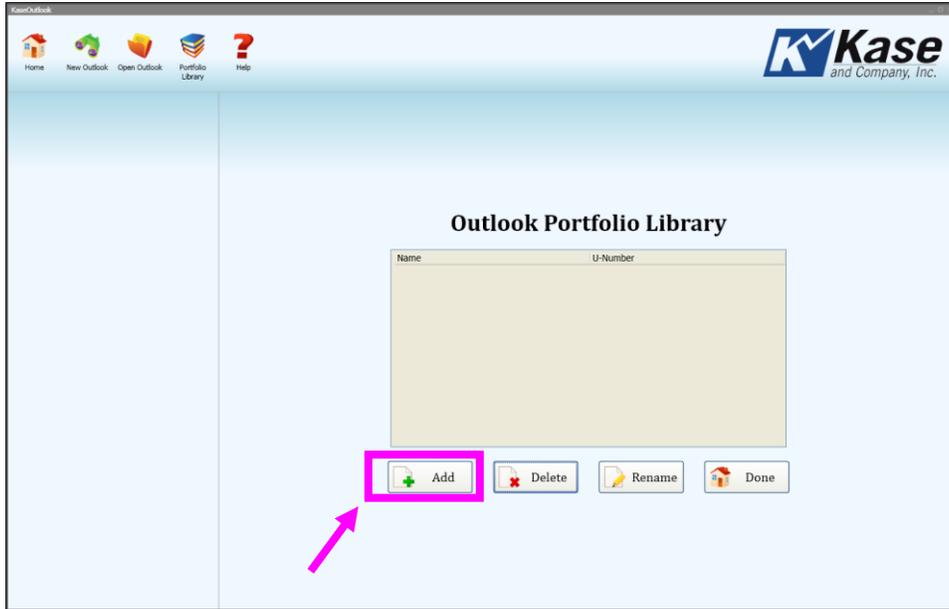
Security	ID	Position	Mkt Px	PCS	FX Rate	Market Val	Cost Px	Cost FX	Cost Val	Cost Date
11) AA UN	AA	1.000	10.21000	EXCH 1.00000	10.21		1.00000			02/23/12
12) AXP UN	AXP	1.000	58.24000	EXCH 1.00000	58.24		1.00000			02/23/12
13) BA UN	BA	1.000	75.30000	EXCH 1.00000	75.30		1.00000			02/23/12
14) BAC UN	BAC	1.000	9.71000	EXCH 1.00000	9.71		1.00000			02/23/12
15) CAT UN	CAT	1.000	107.73000	EXCH 1.00000	107.73		1.00000			02/23/12
16) CSCO UW	CSCO	1.000	21.24500	EXCH 1.00000	21.25		1.00000			02/23/12
17) CVX UN	CVX	1.000	108.60000	EXCH 1.00000	108.60		1.00000			02/23/12
18) DD UN	DD	1.000	53.24000	EXCH 1.00000	53.24		1.00000			02/23/12
19) DIS UN	DIS	1.000	43.97000	EXCH 1.00000	43.97		1.00000			02/23/12
20) GE UN	GE	1.000	20.08000	EXCH 1.00000	20.08		1.00000			02/23/12
21) HD UN	HD	1.000	50.04000	EXCH 1.00000	50.04		1.00000			02/23/12
22) HPQ UN	HPQ	1.000	23.95000	EXCH 1.00000	23.95		1.00000			02/23/12
23) IBM UN	IBM	1.000	208.57000	EXCH 1.00000	208.57		1.00000			02/23/12
24) INTC UW	INTC	1.000	28.40500	EXCH 1.00000	28.41		1.00000			02/23/12
25) JNJ UN	JNJ	1.000	66.25000	EXCH 1.00000	66.25		1.00000			02/23/12
26) JPM UN	JPM	1.000	46.18000	EXCH 1.00000	46.18		1.00000			02/23/12
27) KFT UN	KFT	1.000	38.45000	EXCH 1.00000	38.45		1.00000			02/23/12
28) KO UN	KO	1.000	74.15000	EXCH 1.00000	74.15		1.00000			02/23/12
29) MCD UN	MCD	1.000	98.68000	EXCH 1.00000	98.68		1.00000			02/23/12

To define a portfolio for use in Kase Outlook, start by pressing navigating to the Portfolio Library by clicking the “**Portfolio Library**” (shown below) button on the Home Screen or in the main menu bar in the upper left hand corner.



Define a Portfolio...continued

Click the “Add” button

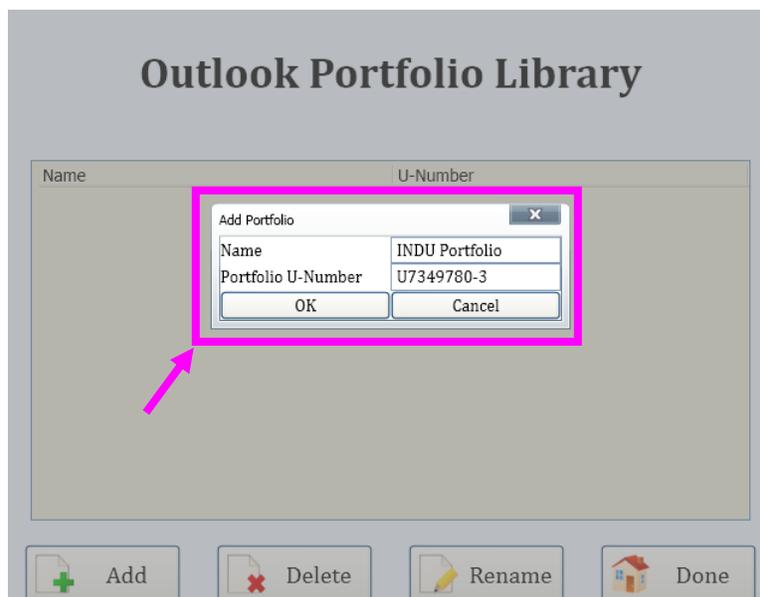


*Note that you can also delete and rename a portfolio in this window

Type in the name of your portfolio. Name choices do not have any restrictions and can be changed by clicking on the rename button below the portfolio library window.

Next, type in the U-Number for the portfolio as it appears in PRTU <GO>.

This number should look something like U1234567-1 where the -1 is the first defined portfolio in PRTU <GO>, -2 would be the second portfolio, etc.



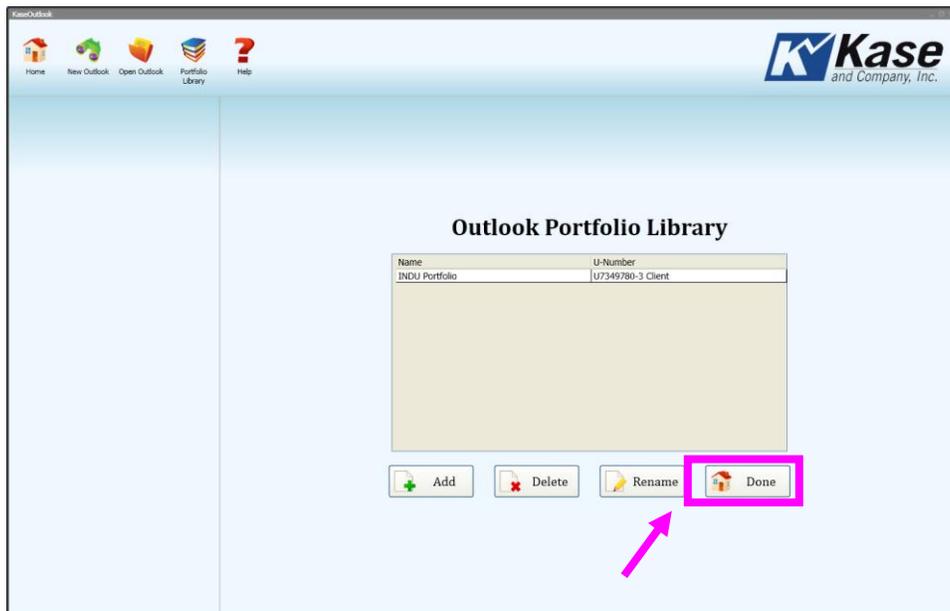
Define a Portfolio...continued

To add another portfolio click “**Add**”

To delete a portfolio from the library click “**Delete**”

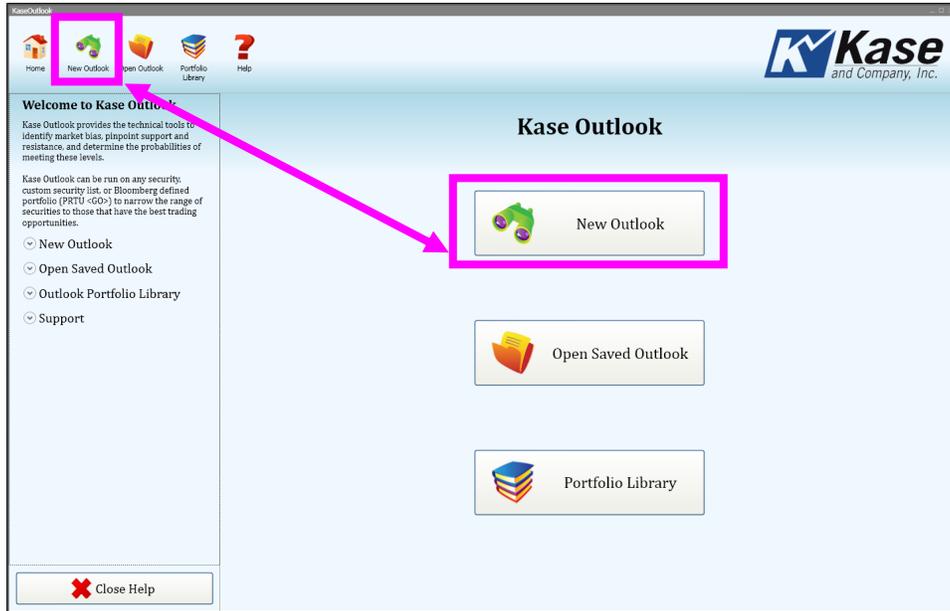
To rename a portfolio click “**Rename**”. Note that only the name can be changed. The U-Number cannot be changed.

Once you are done entering your portfolios click “**Done**”. The portfolios will now be saved on that computer for future reference and use.

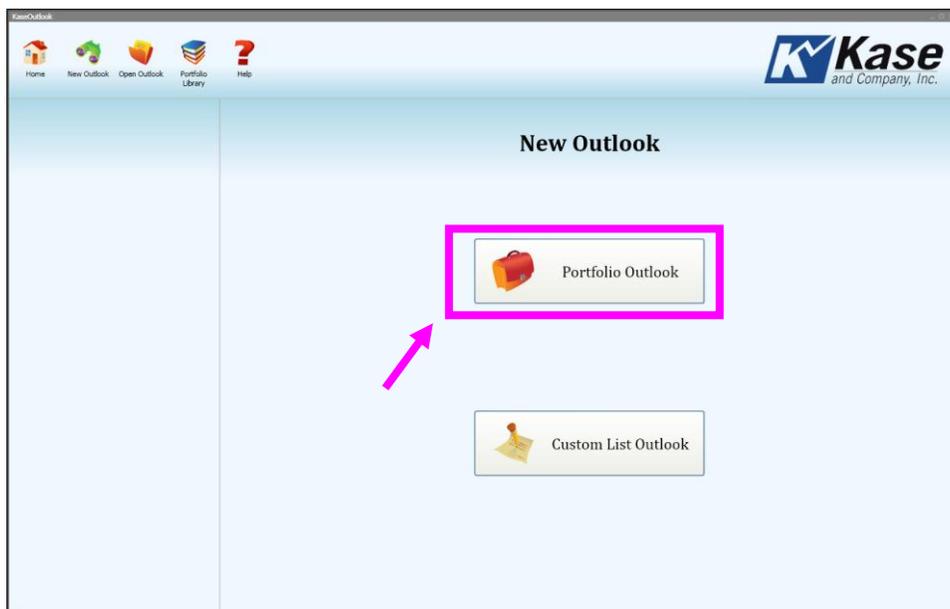


Run a Portfolio Outlook

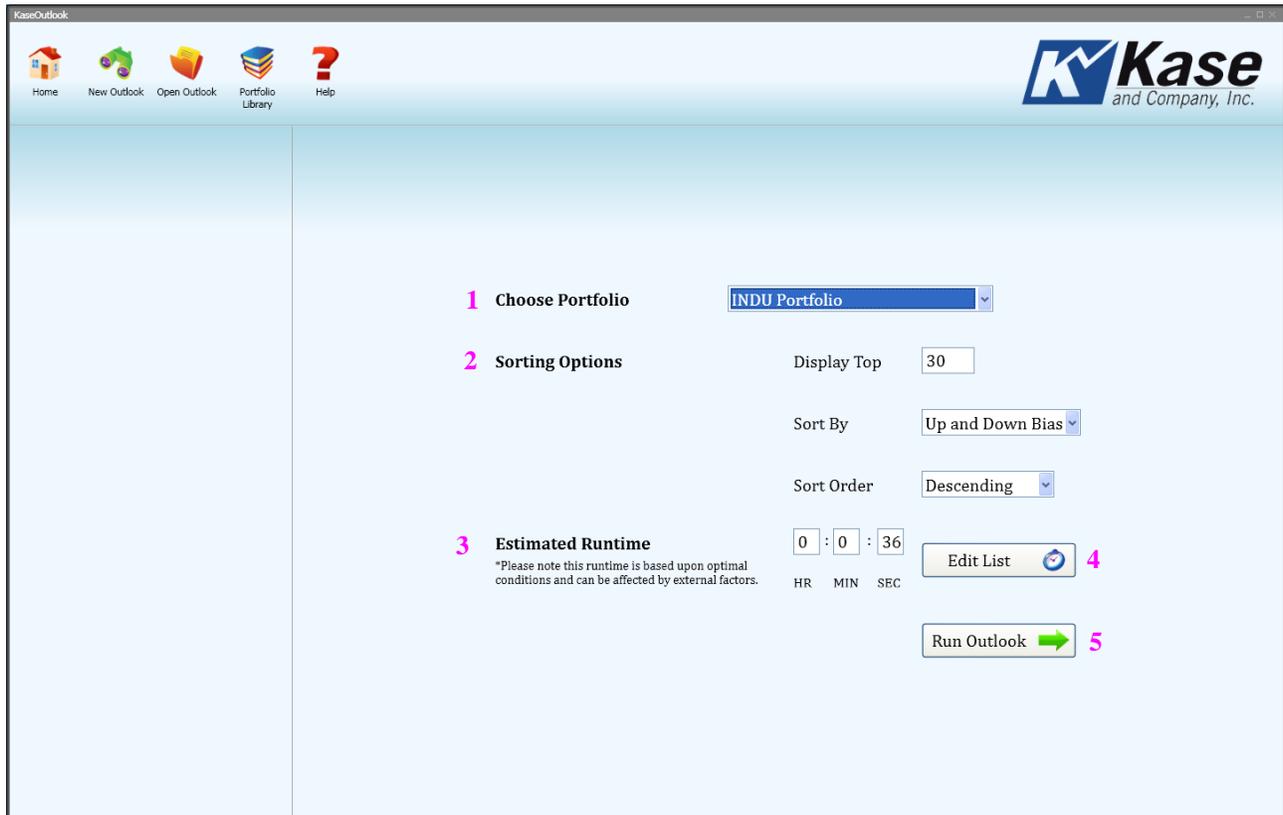
To run a Kase Outlook analysis on a portfolio start by clicking the **“New Outlook”** button on the Home Screen or in the main menu bar in the upper left hand corner.



Click on the **“Portfolio Outlook”** button



Run a Portfolio Outlook...continued



1. Choose Portfolio

The drop down menu contains a list of the PRTU <GO> portfolios that you have defined in the Kase Outlook Portfolio Library.

2. Sorting Options

Once a portfolio has been selected you can choose how many securities will be displayed and how they will be sorted in the outlook dashboard after the run is complete.

3. Estimated Runtime

An estimated amount of time to finish your portfolio run is displayed towards the bottom of the main window. Each security outlook takes approximately 1.2 seconds to run. The estimated runtime is calculated for the number of securities in your chosen portfolio.

4. Edit List

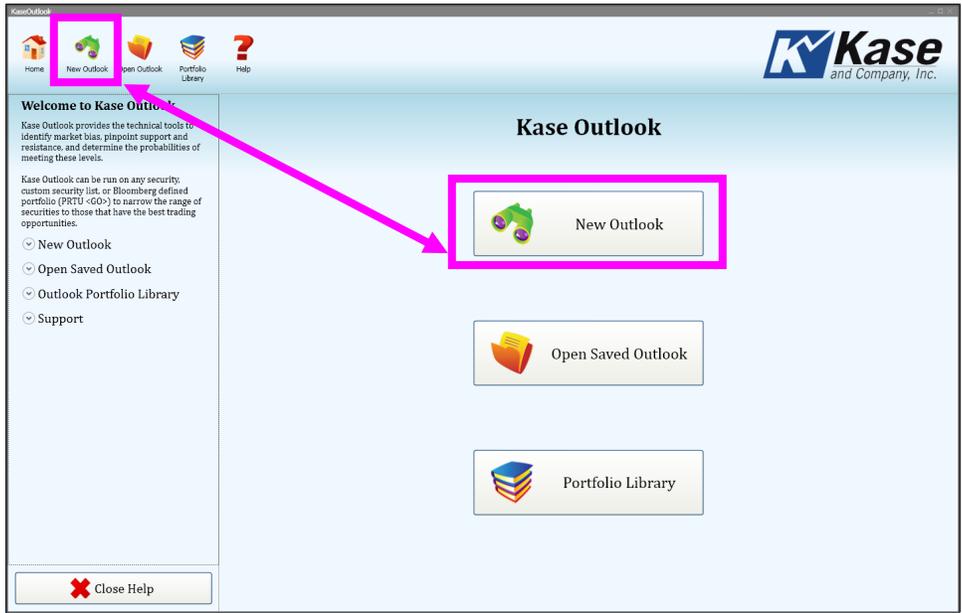
You can decrease this runtime by limiting the number of securities in your portfolio for each run by clicking on the “**Edit List**” button and then un-checking the securities that you want to exclude in the window that pops up. The runtime is updated on the fly and once you are satisfied with the runtime you can press “**OK**” to exit the Edit List window.

5. Run Outlook

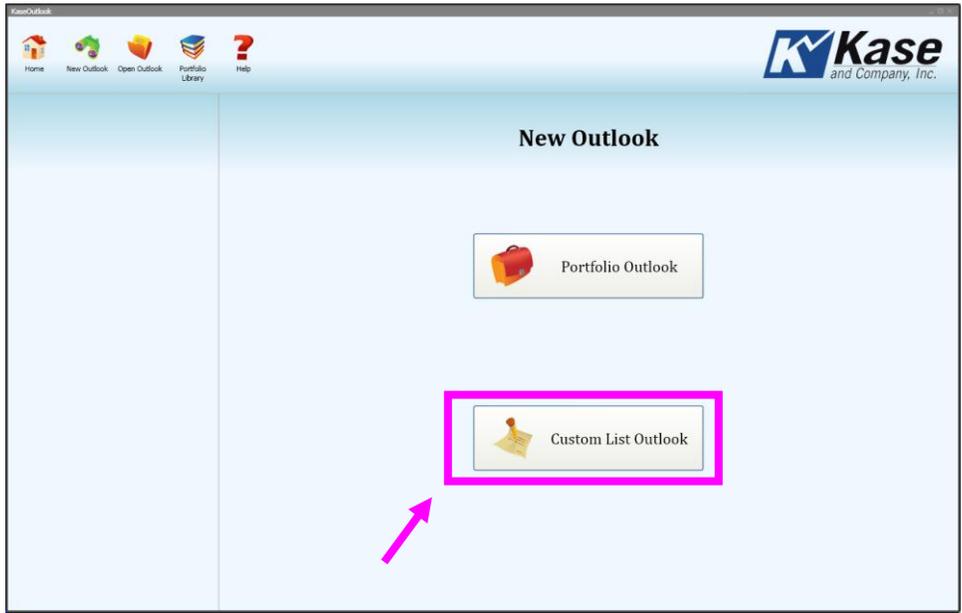
Once you are satisfied with all of the setting press the “**Run Outlook**” button.

Run a Custom List Outlook

To run a Kase Outlook analysis on a custom list of securities start by clicking the “**New Outlook**” button on the Home Screen or in the main menu bar in the upper left hand corner.



Click on the “**Custom List**” Outlook button



Run a Custom List Outlook...continued

The screenshot shows the Kase Outlook software interface. At the top, there is a navigation bar with icons for Home, New Outlook, Open Outlook, Portfolio Library, and Help. The Kase and Company, Inc. logo is in the top right corner. The main area contains three numbered sections: 1. Enter Security List: A text input field with a '+' (Add) and '-' (Delete) button. 2. Sorting Options: 'Sort By' dropdown set to 'Up and Down Bias' and 'Sort Order' dropdown set to 'Descending'. 3. Estimated Runtime: A digital display showing '00 : 00 : 00' for HR, MIN, and SEC. A 'Run Outlook' button with a green arrow is at the bottom right, marked with a '4'.

1. Choose Portfolio

A custom list outlook can be run for 1 to 20 securities that you type in by hand. Type in the security you wish to add to the list and then press the “**Add**” [+] button. To remove a security from the list, click on it and then press the “**Delete**” [-] button. Securities must be entered in the Bloomberg format i.e. DELL EQUITY.

2. Sorting Options

Once the list as been entered you can choose how they will be sorted in the outlook dashboard after the run is complete.

3. Estimated Runtime

An estimated amount of time for your portfolio run is displayed toward the bottom of the main window. Each security outlook will take approximately 1.2 seconds to run. The estimated runtime is calculated for the number of securities in your custom list.

4. Run Outlook

Once you are satisfied with all of the setting press the “**Run Outlook**” button.

The Kase Outlook Dashboard

1. Dashboard Display

When the Kase Outlook Dashboard is first displayed it shows the security's bias direction arrow, bias score, and last price for each security. The securities are sorted in the order chosen on the previous screen. Note that the support and resistance targets and probabilities are not displayed until **"Calculate Probabilities"** is run.

Select	Security	Support Targets					Bias	Resistance Targets				
<input type="checkbox"/>	TRV UN Equity View Full Analysis						59.28 85					
<input checked="" type="checkbox"/>	IBM UN Equity View Full Analysis	194.2 10	198.5 13	202.2 16	205 32	205.57 49	209.32 84	213.5 84	217 79	219.2 74	222.7 69	226.2 64
<input type="checkbox"/>	WMT UN Equity View Full Analysis						61.36 82					
<input type="checkbox"/>	XOM UN Equity View Full Analysis						86.99 82					
<input type="checkbox"/>	MCD UN Equity View Full Analysis						98.33 81					
<input type="checkbox"/>	JNJ UN Equity View Full Analysis						66.14 81					
<input type="checkbox"/>	CSCO UW Equity View Full Analysis						21.185 78					
<input type="checkbox"/>	PFE UN Equity View Full Analysis						22.56 78					
<input checked="" type="checkbox"/>	INTC UW Equity View Full Analysis	25.76 10	26.7 16	27.12 22	27.58 36	27.72 49	28.37 78	29.14 82	29.72 78	30.12 73	30.58 68	31.6 63
<input type="checkbox"/>	DD UN Equity View Full Analysis						53.36 76					
<input type="checkbox"/>	KO UN Equity View Full Analysis						74.13 73					

2. Bias Legend

A bias direction legend is shown in the left panel of the dashboard. This legend explains the various color-coding of arrows based upon bias direction, overbought/oversold indications, and warnings that bias may change soon.

3. Select or Deselect All

This button is used to select or deselect all of the securities checkboxes.

4. Rerun Bias

The **"Rerun Bias"** button allows you to recalculate the bias for all of the selected items in the dashboard. When clicked, a message box will come up and show you the estimated run time and prompt you to confirm that you would like to rerun the bias. To decrease the runtime click **"Cancel"** and uncheck a few of the securities and then click the **"Rerun Bias"** button again.

The Kase Outlook Dashboard...continued

5. Calculate Probabilities

The “**Calculate Probabilities**” button runs analyses to identify the support and resistance targets and the probabilities of those targets being met for the securities selected in the dashboard. Up to 10 securities can be selected and run at once. When clicked, a message box will come up and show you the estimated runtime and prompt you to confirm that you would like to calculate the probabilities. To decrease the runtime click “**Cancel**” and uncheck a few of the securities and then click the “**Calculate Probabilities**” button again.

6. Advanced Sort

The “**Advanced Sort**” button will allow you to resort the items displayed in the Dashboard using the advanced sorting options. There are a number of ways to sort the securities and display them in the dashboard.

Note that only the securities listed in the dashboard, not the entire portfolio, will be resorted. To rerun an outlook on the entire portfolio using new initial sorting criteria you will need to run a “**New Portfolio Outlook**”.

7. View Full Analysis

This button will load and display the details of the full analysis for the individual security chosen. If the targets and probabilities have not been calculated and displayed on the dashboard yet, then they will be calculated when the “**View Full Analysis**” button is pressed.

8. Bias

The bias column shows the last price the security traded at when this analysis was run, the bias score and the bias direction arrow.

Select	Security	Support Targets 9					Bias 8	Resistance Targets 10				
<input type="checkbox"/>	TRV UN Equity View Full Analysis						59.28 85 					
<input checked="" type="checkbox"/>	IBM UN Equity View Full Analysis	194.2 10	198.5 13	202.2 16	205 32	205.57 49	209.32 84 	213.5 84	217 79	219.2 74	222.7 69	226.2 64

9. Support Targets

The “Support Targets” column shows support targets and the probability for meeting each target based upon the underlying technical factors. This column is blank for all securities when the dashboard is first shown and remains blank until the checkbox for the associated security is checked and the “**Calculate Probabilities**” button is pressed.

10. Resistance Targets

The “Resistance Targets” column shows resistance targets and the probability for meeting each target based upon the underlying technical factors. This column is blank for all securities when the dashboard is first shown and remains blank until the checkbox for the associated security is checked and the “**Calculate Probabilities**” button is pressed.

Full Analysis

This view shows you all of the details of the security's analysis. Targets are displayed in the left view panel and can be adjusted. The tabs across the top can be clicked on to view the different details of the analysis.

1. Back to Dashboard

Click the **“Back to Dashboard”** button to take you back to the outlook dashboard.

2. Recolor

The **“Recolor”** button will recolor all of the cells in the analysis based upon the colors defined for the targets in the left panel of the full analysis view. When recoloring targets no reoptimization is done for the targets.

3. Reoptimize

The **“Reoptimize”** button will run Kase Outlook’s proprietary optimization algorithm against the targets and target tolerances to identify the most confluent target ranges. The optimization algorithm is run when the full analysis is first done, but as targets and target tolerances are adjusted you should always **“Reoptimize”** the analysis to pinpoint the most confluent targets.

4. Adjust Global Tolerance

The “**Adjust Global Tolerance**” button will allow you to change the global tolerance used for the security being viewed. The global tolerance is automatically calculated when an analysis is first run on a security and is used to identify the areas with the most confluent targets.

The global tolerance is set as a +/- range, and any potential targets within that range are used to identify the support or resistance targets. The ranges with the highest number of wave-projection-finds are displayed as targets in the left panel.

Note that individual ranges can be tweaked by hand in the left panel, so this button should only be used to adjust the global tolerance for the entire analysis.

Customer Support

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