

What is Tradex?

Tradex is a stock market technical analysis and portfolio manager for the Macintosh. It has been designed as a sophisticated tool for the reasonably experienced or expert technical analyst to evaluate stocks with respect to their historical prices and volumes.

Most of the well-known technical indicators are included, as well as some not-so-well-known ones, and some unique specimens as well. These indicator functions can be applied in any combination. For example, you can take a 12-period moving average, a 7-period moving average of that 12-period moving average, the momentum of the 7-period moving average, etc.

A simple but adequate portfolio manager is included that ties in with historical data and can evaluate the portfolio in terms of profitability over time, etc.

Data in virtually any text form (available via most on-line data providers) can be imported or used to update Tradex data files.

What Tradex isn't?

- Tradex isn't a "tell me what stock to buy or sell" type of application. There are few decision making functions built in. With the aid of the built-in tools, a sophisticated technical analyst can make his or her own decisions.
- Tradex doesn't handle intra-day trading, which is generally required for the futures and options markets (so I'm told).
- The portfolio management functions are relatively sparse and limited security features are included.
- Tradex was not designed with the complexities of the US

stock market in mind, so it might need a little patience to set it up correctly.

- Tradex does not handle (in its current incarnation) Fundamental Analysis.
- Tradex is not a flashy, expensive, well-supported, commercial piece of software (although, with your support, it could be).
- No, an IBM PC DOS/Windows version is not available. If a new version is ever written, it probably would be cross-platform, but this is, at best, a year or more away.

Distribution

Feel free to distribute this software to anyone you think might like to try it. The only stipulation is that the original set of files be distributed, including the document you are reading now.

Installation

Resources required

To the best of my knowledge, this software will run on any Mac from the MacPlus upwards, using System 6.0.7 or upwards (it'll probably work on older systems back to 4.2, but to be on the safe side, upgrade to 6.0.7 or above). Some of the features require System 7.0 or later, so if you haven't taken the plunge yet, now would be a good time to do so.

You will need at least 1MB of RAM to run the application, and more is recommended/required if you're using System 6 with Multifinder or System 7. A couple of megabytes of hard disk space is also required.

The application distributed with this package will make use of an FPU (math-coprocessor) if you have one, but is quite happy if you don't. It's also happy on a Power Mac, but not native (yet).

Instructions

Copy the files in the archive to your hard disk (if you're reading this the chances are you've already done it). The Tradex application always creates a folder called Tradex Stuff (for its own nefarious purposes) on your hard disk, and a preferences file in your System Folder.

Open the Tradex application.

Note: the first time you perform certain functions each day, the application will search your hard disk/s and update its information indices. This can take a few minutes. (This operation can be disabled once your data files have stabilised). The latest version also allows this "feature" to be turned off in the Preferences.

Have fun. Be prepared to have patience. Lots of it. Once you've figured out how to use this application, you'll be amazed as to its power and flexibility.

A short history

A long time ago, in a galaxy far, far away...(well, 1984 to be exact, and the other side of this planet actually)...the Macintosh, in all of its 128K glory, was launched, and yours truly fell immediately and deeply in love. There was one problem. I was fairly poor, having recently handed over my

body and soul to my bank manager by buying a new car and a home. The lure of owning a Mac was irresistible, so an alternative plan was required.

I approached the local Apple dealer and made them a deal - they would supply me with a Mac, and I would write them software for it, thus making the hardware sell like hotcakes. They agreed and asked for suggestions on what software should be written. The application they chose was a stock market technical analysis program.

The next problem was developing the beast. It soon became apparent that there was no development software available running on the Mac. Some eyebrows were raised, but the only way out was to use a Lisa with a (gasp!) 5Mb hard disk. This was duly supplied, together with some interesting software and a hand-typed and annotated copy of the original Inside Macintosh documents from Apple.

With the aid of this, and no training or mentoring whatsoever (apart from 10 years of other programming experience and a couple of degrees in computer science), I set forth on a mind-bogglingly complex programming journey.

I was fortunate to be introduced to a real live stock market investor early on in the process. He was about as mathematically rigorous as my cat, but had a wealth of real-life experience. Thus it was that the pair of us, over a period of several years, and several Macs, developed the Tradex application.

During this period, the Apple Mac was dropped from the inventory of the dealers who had originally supplied my equipment, and they lost interest. I eventually handed back the equipment (when it was totally obsolete and somewhat grubby) having had bought my own equipment.

Eventually the stage was reached where I was ready to stick my toe in the cold waters of the software market, and find someone interested in marketing Tradex. On a trip to the USA I discovered just how cold the water really was.

The long and the short of it was that the product was just not saleable or marketable as it stood (especially with the original developer many thousands of kilometres away), and the demands of the US stock markets were somewhat different from those back home. Apple even had the application examined by consultants and agreed that it needed a lot of work.

One of the problems was acquiring data. A fudged-together application on a PC had been used in the past, but it wouldn't work in the US.

I realised that a major rewrite would be required, together with programs to download data from various sources. I had neither the time nor the money to do this, and thus the development of Tradex stopped.

At this point in time I relocated to the US, and decided that maybe someone could use the application if I made it shareware. Maybe I could even make a few bucks to cover the man-years of my valuable time that it took to develop (although I did get a Mac and valuable experience out of it), and maybe even generate enough interest to warrant the development of a totally new version.

The response (as of this writing) has been slow but steady, and I'm now considering a major commercial rewrite of Tradex. The new version would contain the current version's functionality, but would be more efficient, reliable, and have a more standard Mac interface. "Early adopters" of the current version would be in line to be beta testers of the new software and get a free copy of the final release

(if/when it appears).

What you're getting

The Tradex application

The Tradex application you're getting is a full-blown version, not crippled in any way (well, not intentionally!), and completely free of those annoying little reminders that "you haven't registered yet".

Sample data

Included are some (somewhat-out-of-date) data files for various fictitious stocks which are used in the manual as examples. In addition, there are some US stock prices (totally out-of-date) for a few selected stocks.

First few chapters of the manual

The first few chapters of a preliminary manual are included as a tutorial to get you going, and to give you a taste of some of the many features of Tradex.

No support

Until you register, you get **NO** support at all. If you try and send me voice, snail or e-mail to get support, it will only annoy me (although you're welcome to try). Bug reports are welcome, as are questions about functionality, etc., but don't lose sleep waiting for the next version (or a fix) if you're not registered.

What you're not getting

System 7 savvy-ness

When development stopped on this product, System 7 was just a twinkle in someone's eye. There is no support for Publish/Subscribe, Apple-events, Scripting, etc. The application appears to be System 7 compatible, however, and all known inconsistencies have been removed.

Bug-free software

With software of this complexity, which hasn't been thoroughly beta tested, there are bound to be bugs and inconsistencies. You might have to "drive defensively" to avoid some of them. I hate the thought of having any bugs in my software, but it's a fact of life with a chunk of code this big. I make an attempt to eradicate bugs as they are reported.

User-friendly interface

I didn't have the luxury of attending the Apple Developer University, or even having a single peer to consult with when this application was developed, so the interface is not totally acceptable as far as the Mac Interface Guidelines are concerned. Some of the features are slow and clunky (scrolling is an example) because I couldn't figure a neat and simple way to make them work properly at the time. Some of the features are downright weird.

Fast graphics

The charting side of things is not the fastest graphical interface in the universe. Far from it. I never got around to optimising it.

On-line data download

I've never gotten around to writing a download application for the US market. However, this is in the works, since it will be a small external application that shouldn't take too long to develop (if I ever find the time). However, if you can get data from anywhere in the form of a text file (e.g. Compuserve, AOL, etc.), then Tradex can probably use it, with suitably configured import parameters.

Comprehensive portfolio management

Hey, I'm not an investor myself (don't have the gambling instinct), so how would I know what is required in a good portfolio manager? If I could afford it, I'd buy one and check it out for features, but it's too late now. I personally think my portfolio manager is adequate, but you, and possibly your accountant and the IRS, might not. Send in your suggestions.

Other nice features

Features such as data import and export from other applications are not available, although import and export of text files (e.g. Excel format) can be done.

Fancy manuals

The only manual available for this is a preliminary tutorial manual, which was developed over a period of a few days by running through the various features of the application with the aid of a dictaphone and screen shot utility. A secretary then typed the whole thing in (verbatim) and I edited it and added the diagrams.

With an application of this complexity, one would expect a tutorial manual and a reference manual, and possibly a “guide to technical analysis” to explain how to use the application to your best advantage and what the various “mathematical” functions actually do. All of these things would be possible were time and money freely available.

I am updating the manual, and registered users can now expect to get additional information on usage and such things as an annotated bibliography, formulae used within the application, etc.

Full support

A complex application like Tradex would warrant a high price, and with that high price would come an expectation of real-time technical support, like you would get (or hope to get) from a large software company. I can't offer that. I have to sleep.

Caveats

I make no guarantees as to the correctness or usefulness of this product. You get what you get. If you lose your shirt on the stock market because of Tradex, it's your problem, not mine. If you make a million bucks in the first year, that's great. Tell me about it so that I can get a warm glow, or send me a bonus cheque in the mail! If you are a casual user, without experience in technical analysis, you won't be able to get the best out of Tradex, and it could be downright dangerous to use (like a weekend Cessna pilot in the cockpit of an F-15). There are many books on technical analysis - I suggest you visit the library or bookstore.

What you get if you register

Faster versions of the application

As well as the latest version of the application you received here, you'll get other versions compiled for use on 68020-based Macs with and without FPU's (Mac IIs and above). A Power PC native version will probably appear during 1995 (and will be sent to all registered users on request).

The rest of the manual

The rest of the preliminary instruction manual in computer-readable format (Word 5.0).

Limited support

I will offer limited support to registered users on a snail mail/ e-mail/ fax basis. i.e. you pose the questions, and I'll attempt to supply answers, but not "live" - I have a life too, and this is not likely to pay my mortgage. There will be a day or two turnaround time, or more if I'm on vacation or bogged down in real work. I might also have to limit the number of queries per user if the demand heats up (unlikely). This support will be in place for at least three months after you register. For further support, see below.

Future versions, manuals and updates

As a registered user you will be entitled to any future updates of the current version (Version 1.x.x) of the application, as well as manual updates, bug reports and fixes, data download applications, etc. If you have an E-mail account that is accessible

from the Internet or CompuServe, you will get information on latest releases, bug fixes, etc. much quicker than if you don't. If you are only available via snail-mail then you will only receive **major** upgrades, since e-mail is a lot cheaper than snail-mail and diskettes. This is surely incentive to get yourself wired into the information age?!

For those already hogging the fast lane on the information superhighway, the latest version of the shareware package, and updates to the latest versions of the registered software is (usually) available at:

World-Wide-Web: <http://www.cyberspace.com/rodman>

Anonymous FTP: <ftp://ftp.cyberspace.com/pub/archive/rodman/>

Registering

The registration fee is \$50 and includes the computer-readable (Word 5.0) version of the manual and at least three months of limited support (outside the USA, add \$5 for snail-mail shipping unless I can deliver it to you via e-mail - remembering that it is a couple of hundred K in size).

(I know, I know, everybody else wants \$20 for shareware - but check out the complexity of the application; there's several man-years of effort embedded in there. This is not your typical cute little desk accessory or Hypercard stack)

Although you won't be needing it at this stage, I will continue the limited support at the rate of \$50 per year after your three months is up, if necessary. If this happens, I'll give you plenty of notice. If it turns out that you want more than the rudimentary support, we can discuss it.

You can send a check or money order (no credit cards) made out to:

Paul Rodman

my address is:

14138 SE 238th Lane
Kent, WA 98042, USA

If you want a receipt, please request one.

If none of the above methods of payment satisfy you (i.e. they're too expensive or inconvenient - especially for users in other countries), you can send a US\$50 note. I'm pretty honest, but feel free to ask me for a list of users who have sent cash from abroad and who are satisfied. You could also register or certify the mail to assure it gets to me.

Oh yes, if you are unhappy with your registered version of Tradex, return it or destroy it within 30 days and ask for your money back.

Disclaimers

Limitation on Liability

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