BEYOND INSIGHTS (Company Reg. No. 836403-V)
Bringing out the Best in You & Your Financial Future

Power Options
Tutorial 1
Agenda

- Think or Swim (TOS) Platform navigation
- TOS Configuration & Set Up
- BUY Stock with Profit Taking & Stop Loss
- Monitor Trade
- Adjust/Amend Trade Orders
- Close Trade

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TDAmeritrade Platforms

- TDAmeritrade has 2 main platforms
  - Web-based (login from www.tdameritrade.com top right hand corner “Client logon”
  - Thinkorswim (best features and trading speed)

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Thinkorswim Key Configuration

- These subsequent instructions are the One-time Setup that you need to do to customize Thinkorswim platform to your needs

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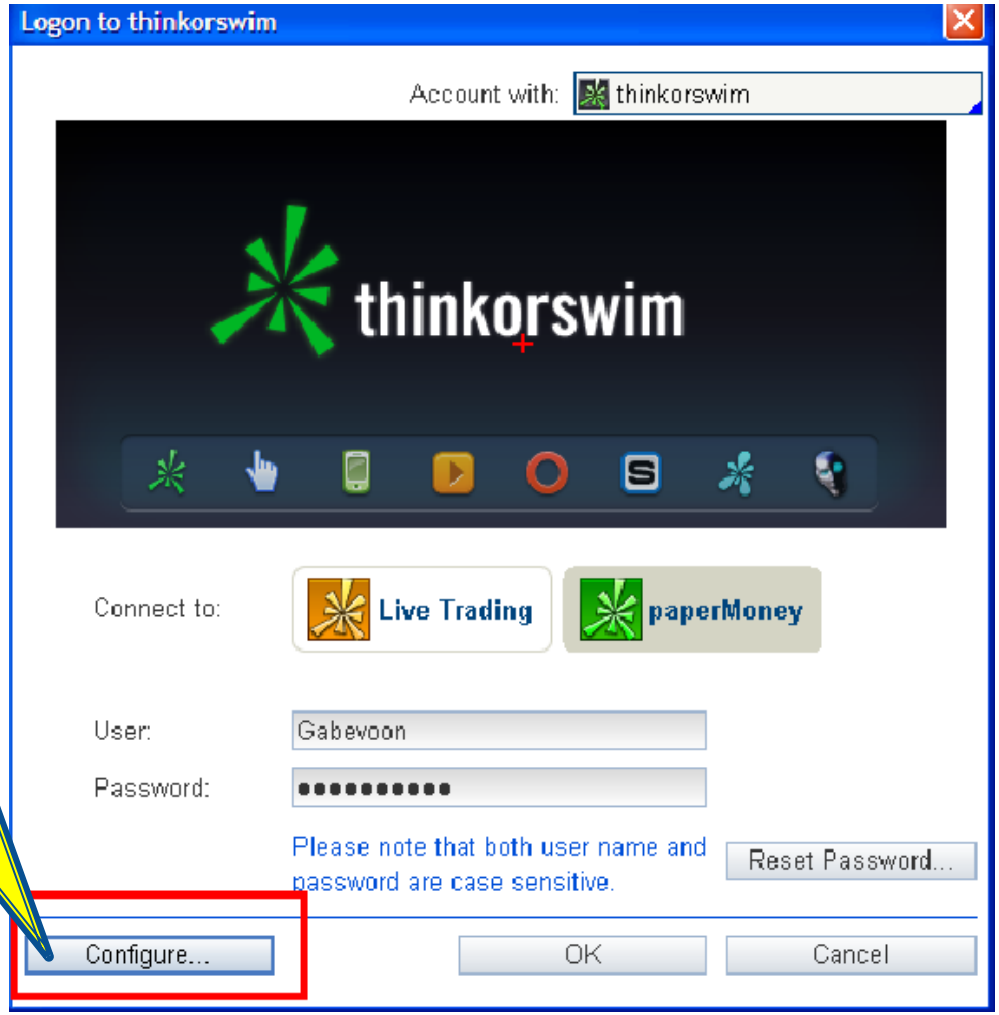
Setting Up TOS (Before Logging in)

Click here to Configure Default Font Size & Background color Before logging in



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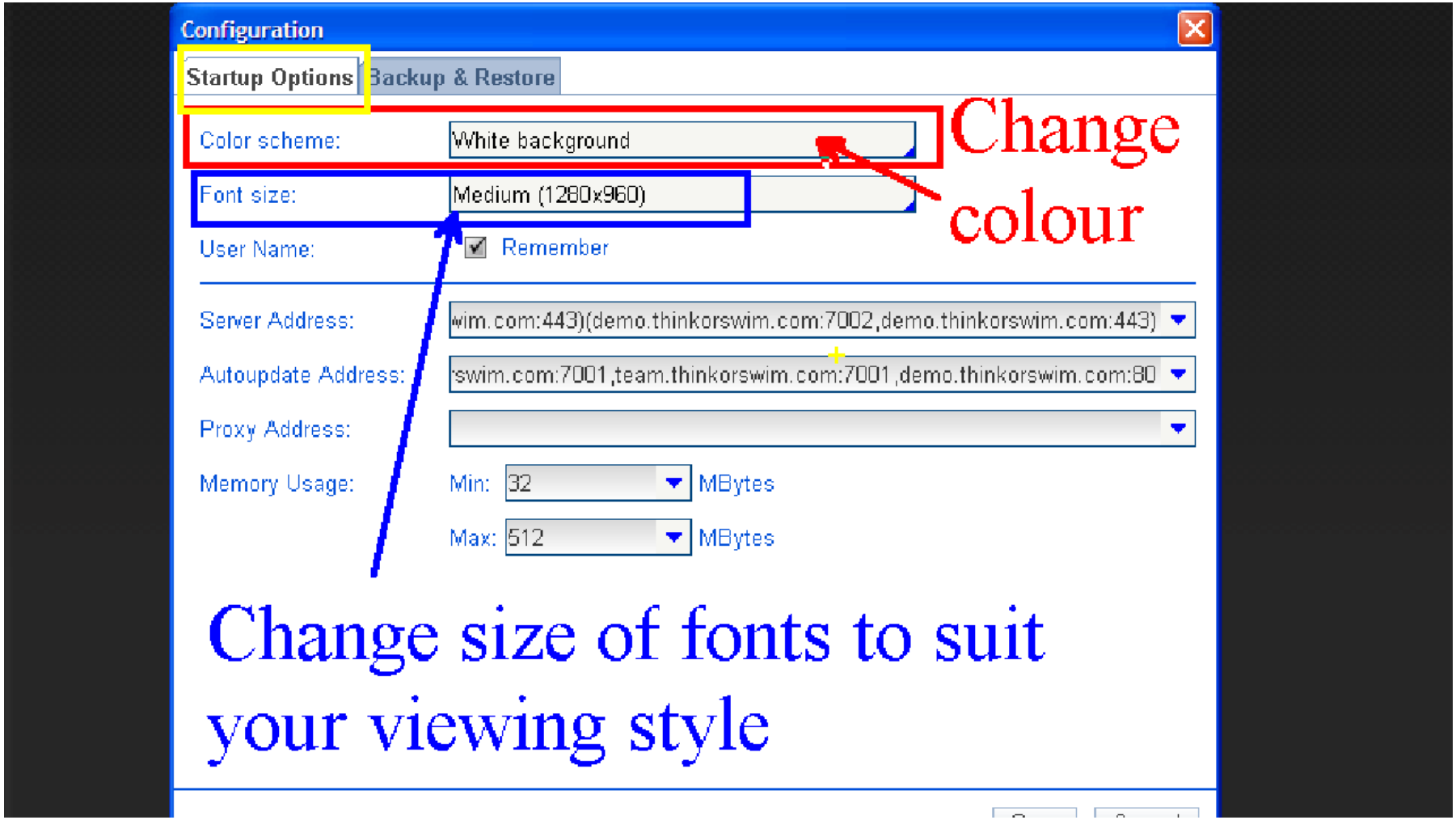
TOS Set Up

(Change Background Color & Font Size, then click OK)



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Login to Demo(Paper Money) Account

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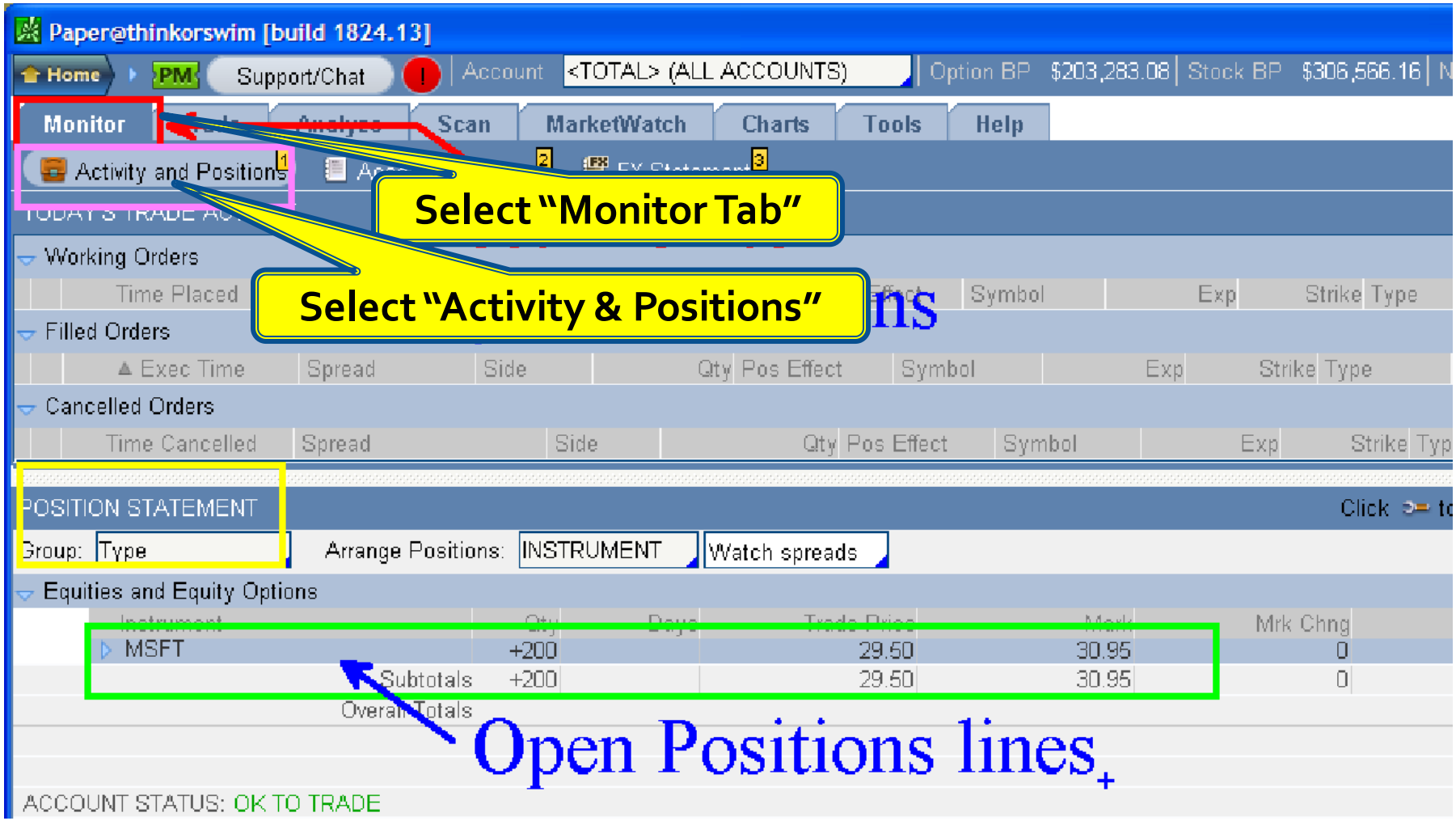
"Monitor Tab"

All Pending & Live Orders are shown here



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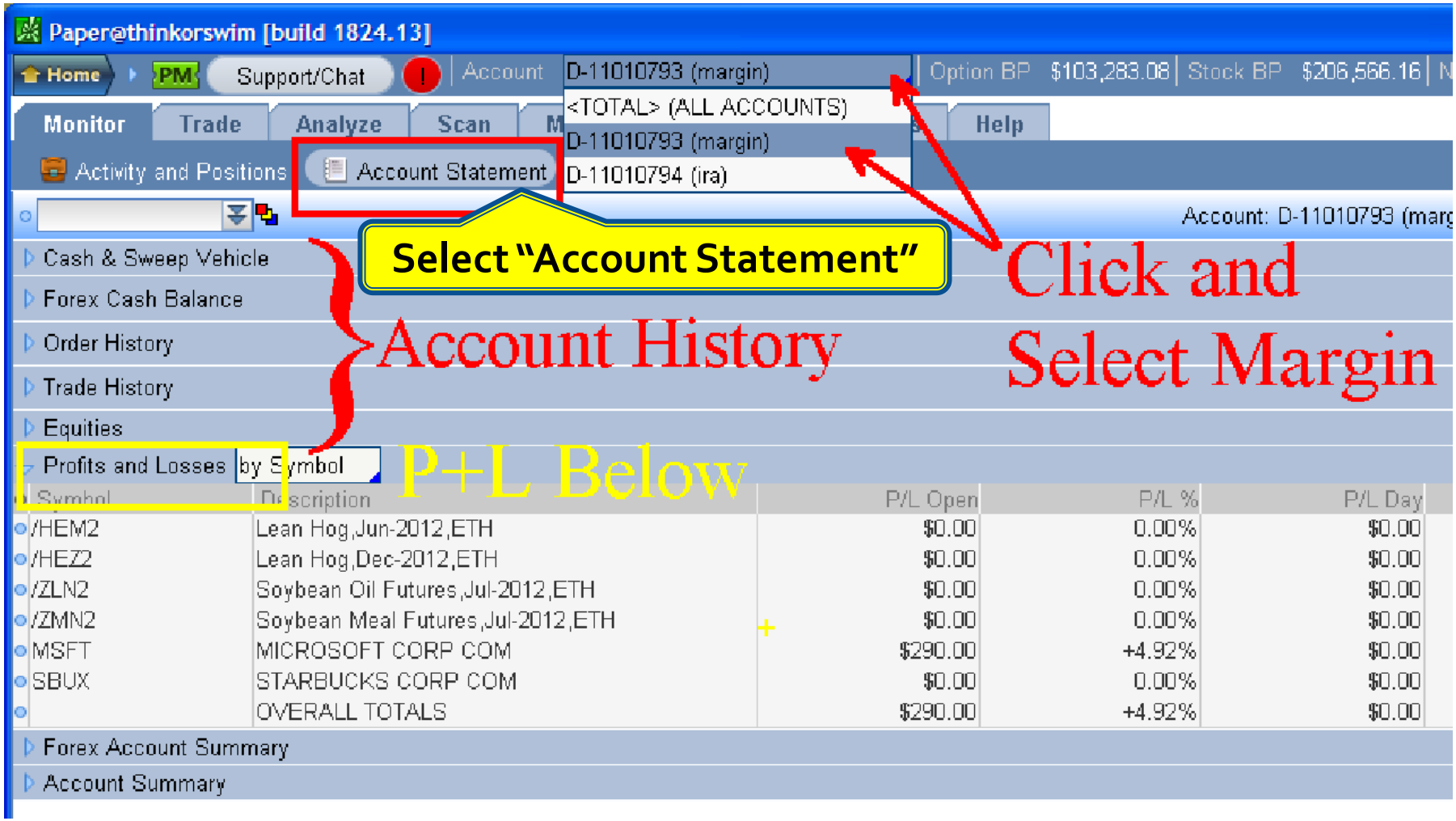
Account Statement

Current Trades & Account History



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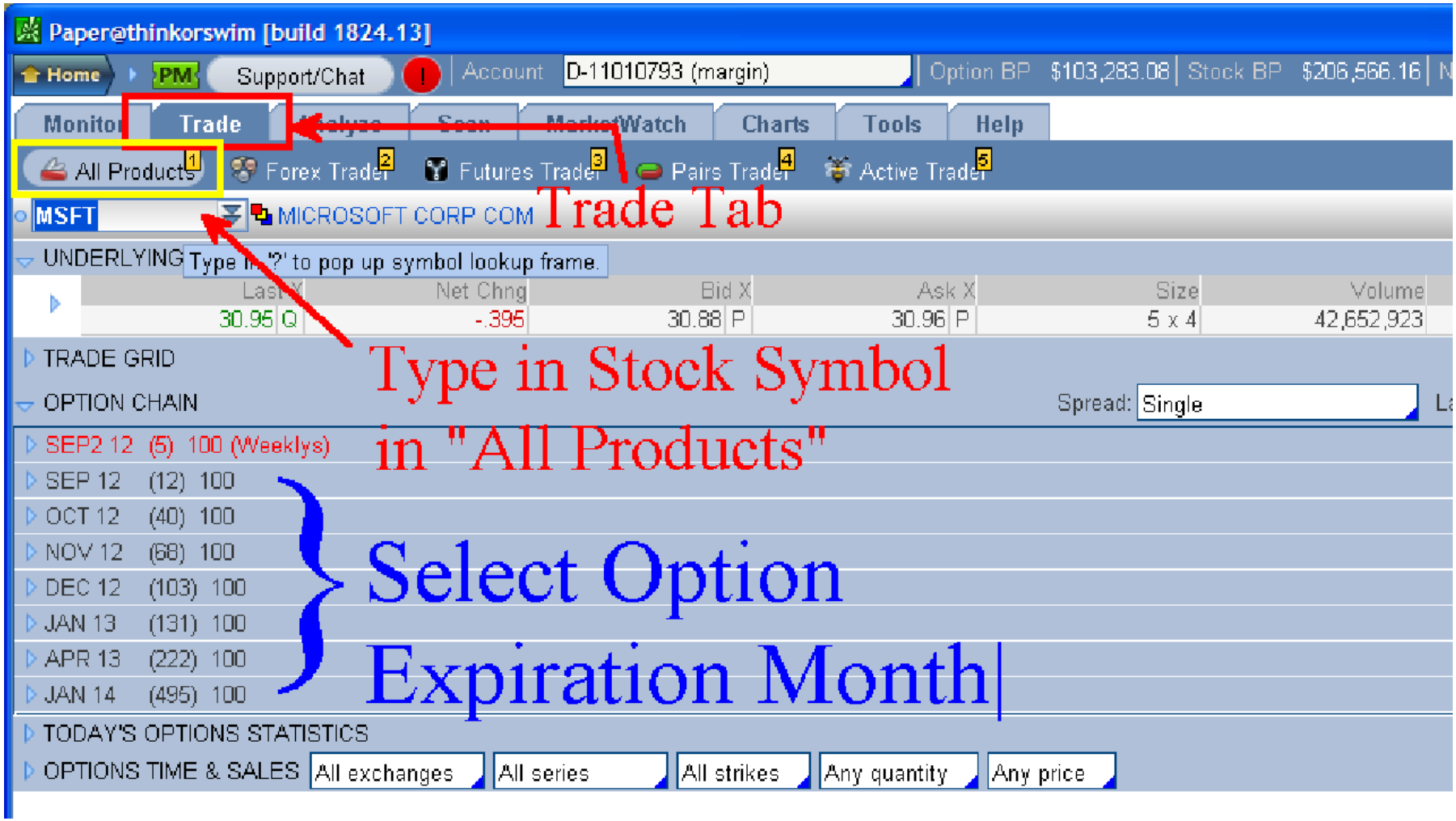
"Trade Tab"
Select All Products



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3 types of Chart in TOS

- **TOS Chart**
  - Good for checking live trades charts as it loads faster than Prophet charts
- **Prophet Chart**
  - Best for technical analysis as it is more user friendly as most tools needed are visible and handy instead of needing to right click.
  - Takes more time for initial loading
- **Flexible Grid Chart (derived from TOS Chart)**
  - Enable you to see multiple charts at the same time in a Grid form. (best for bigger monitor)
  - Configuration is the same as TOS chart

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3 Types of Charts

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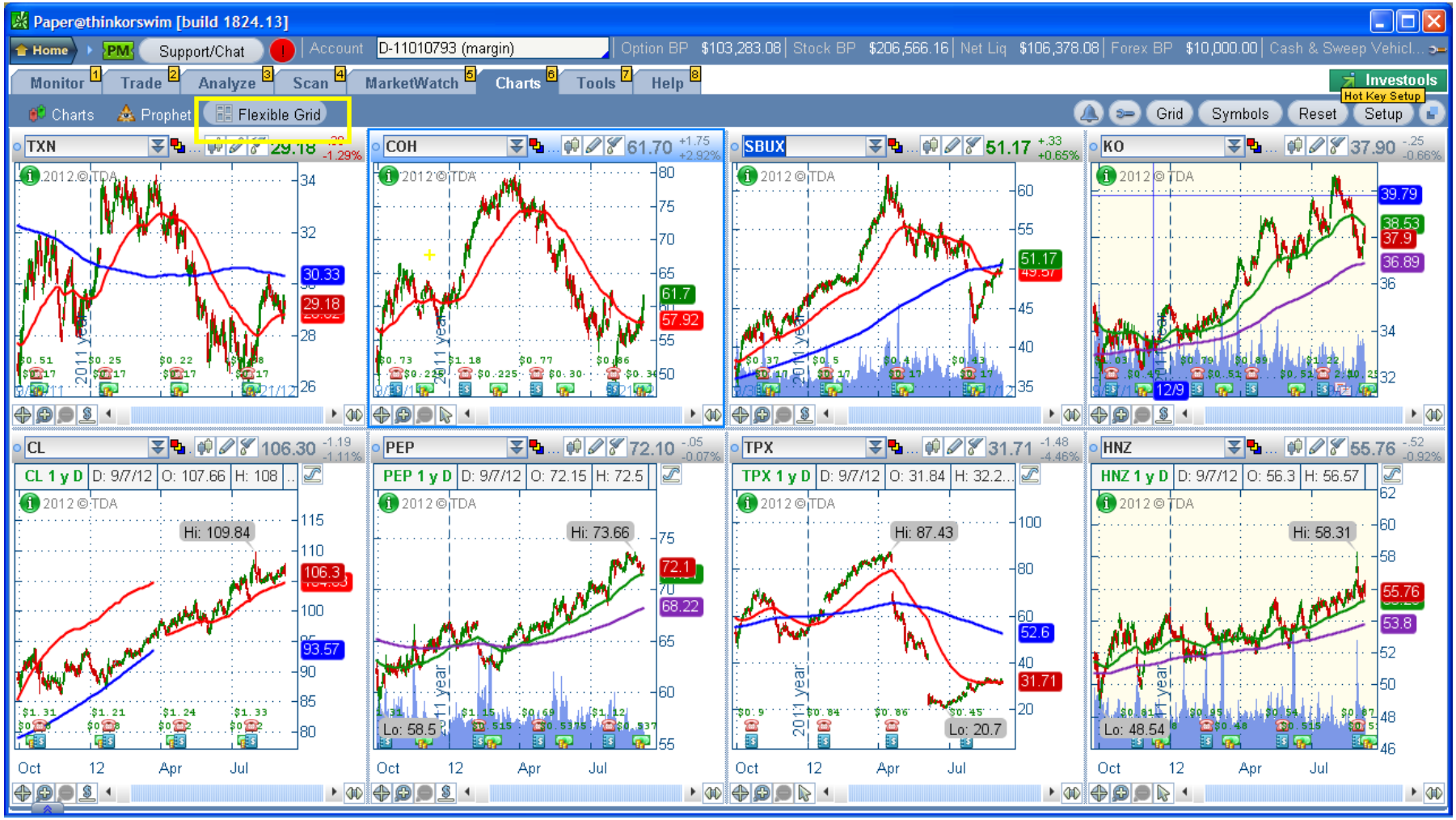
3 Types of Charts

Grid Charts



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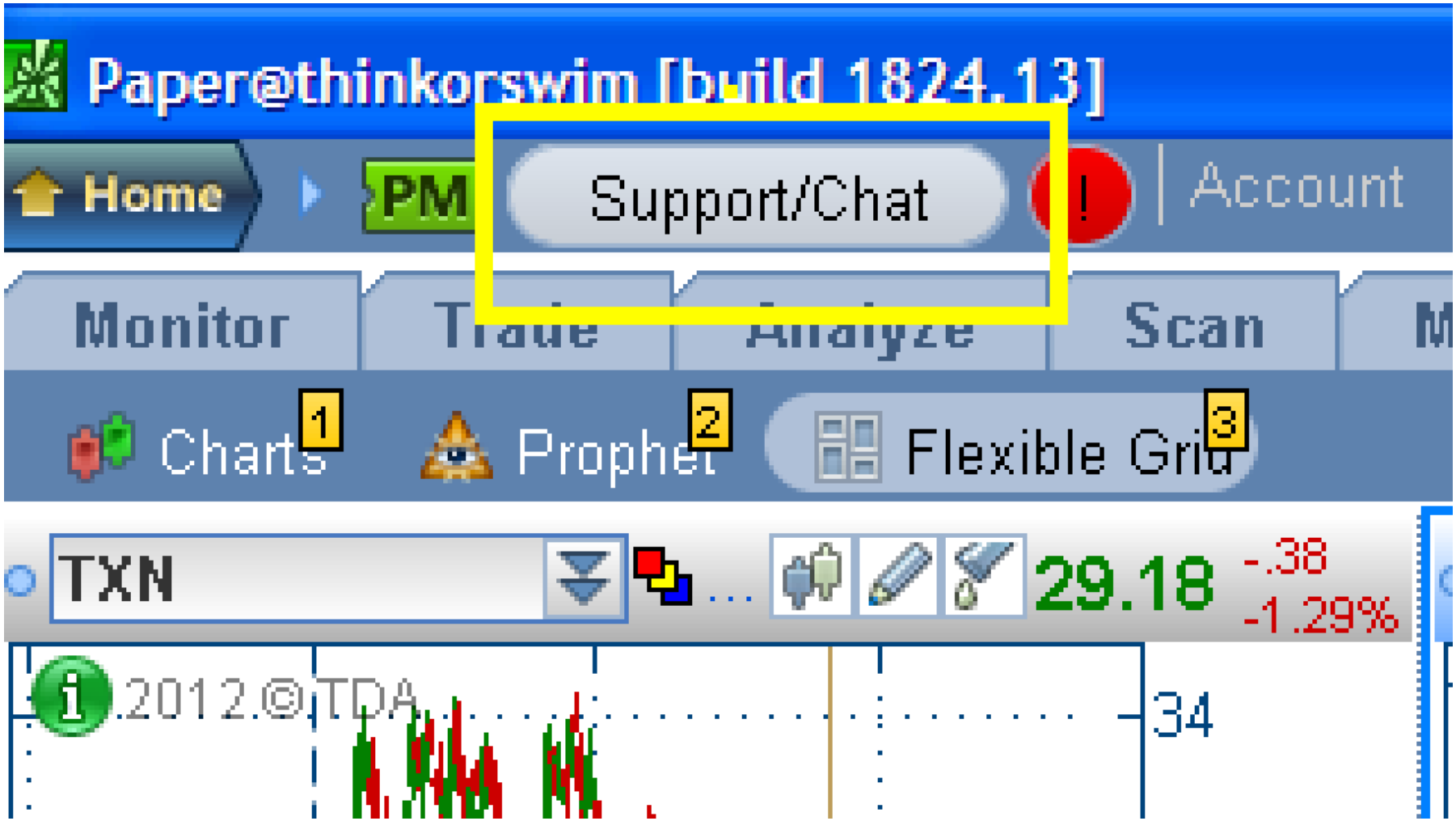
TDAmeritrade Help/Chat Support



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TOS Platform Default Set Up

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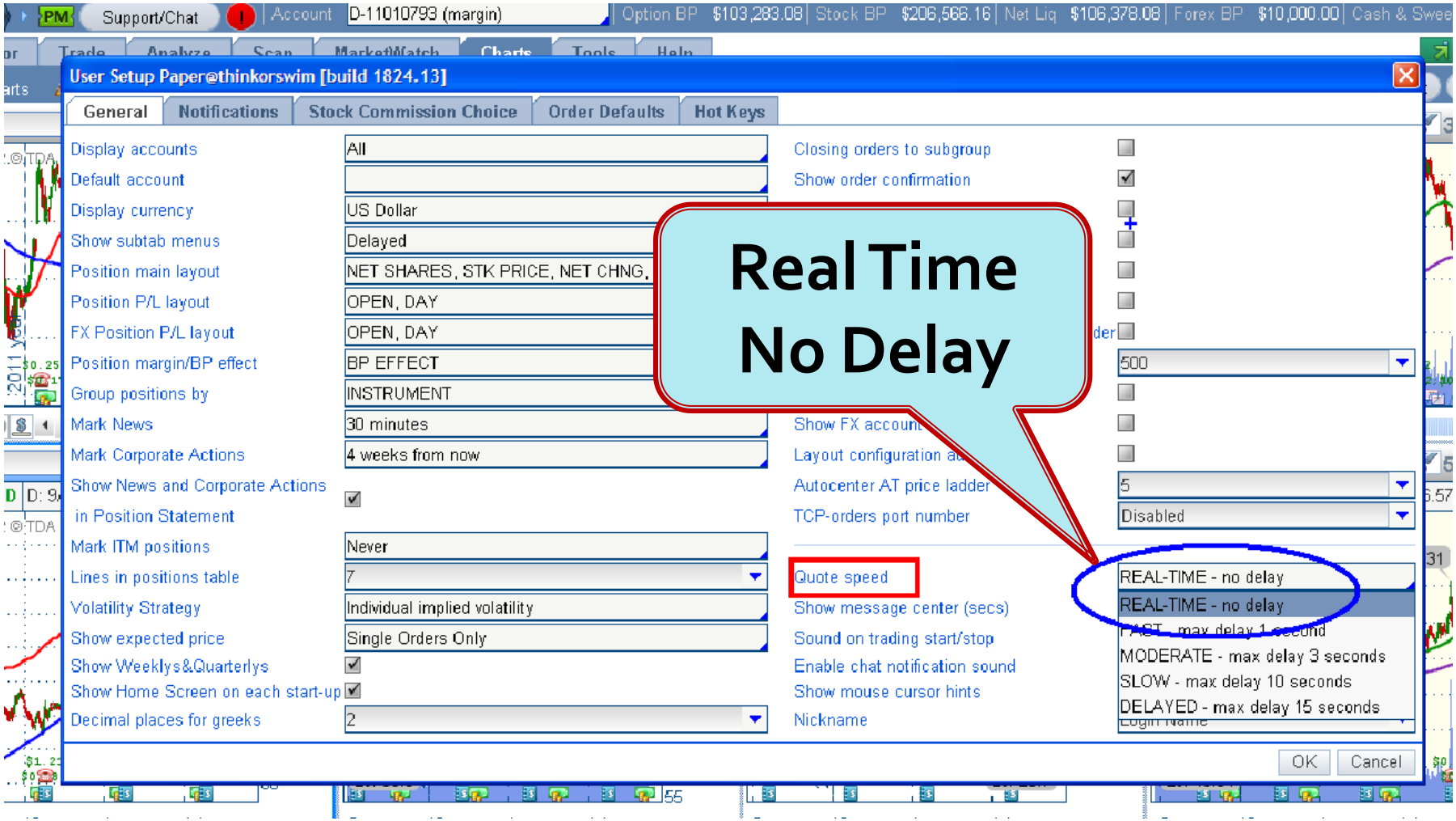
Application Settings

Set Up Platform Speed in Live Trading



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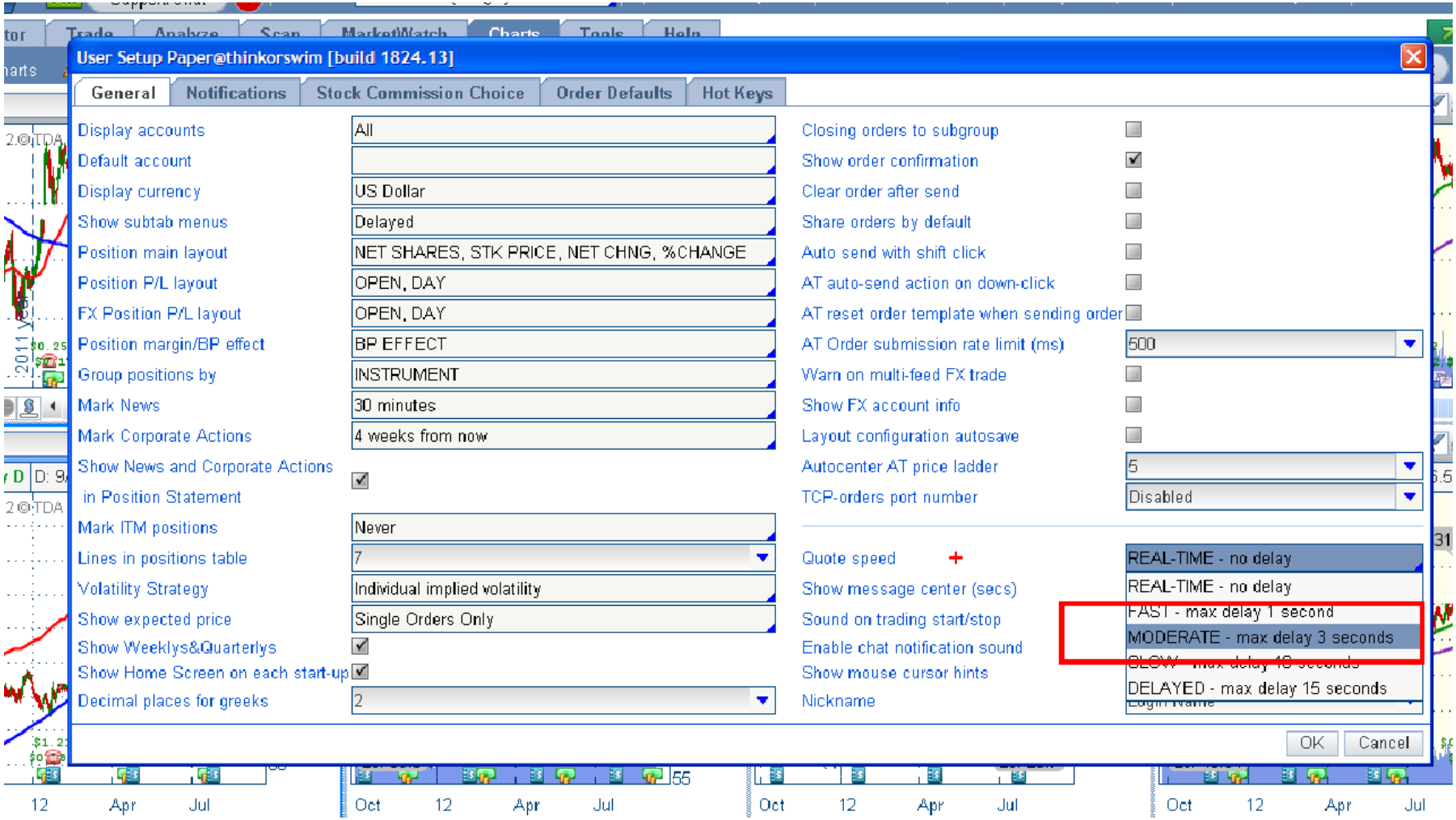
For Tutorial Please select “MODERATE” to reduce impact on network bandwidth



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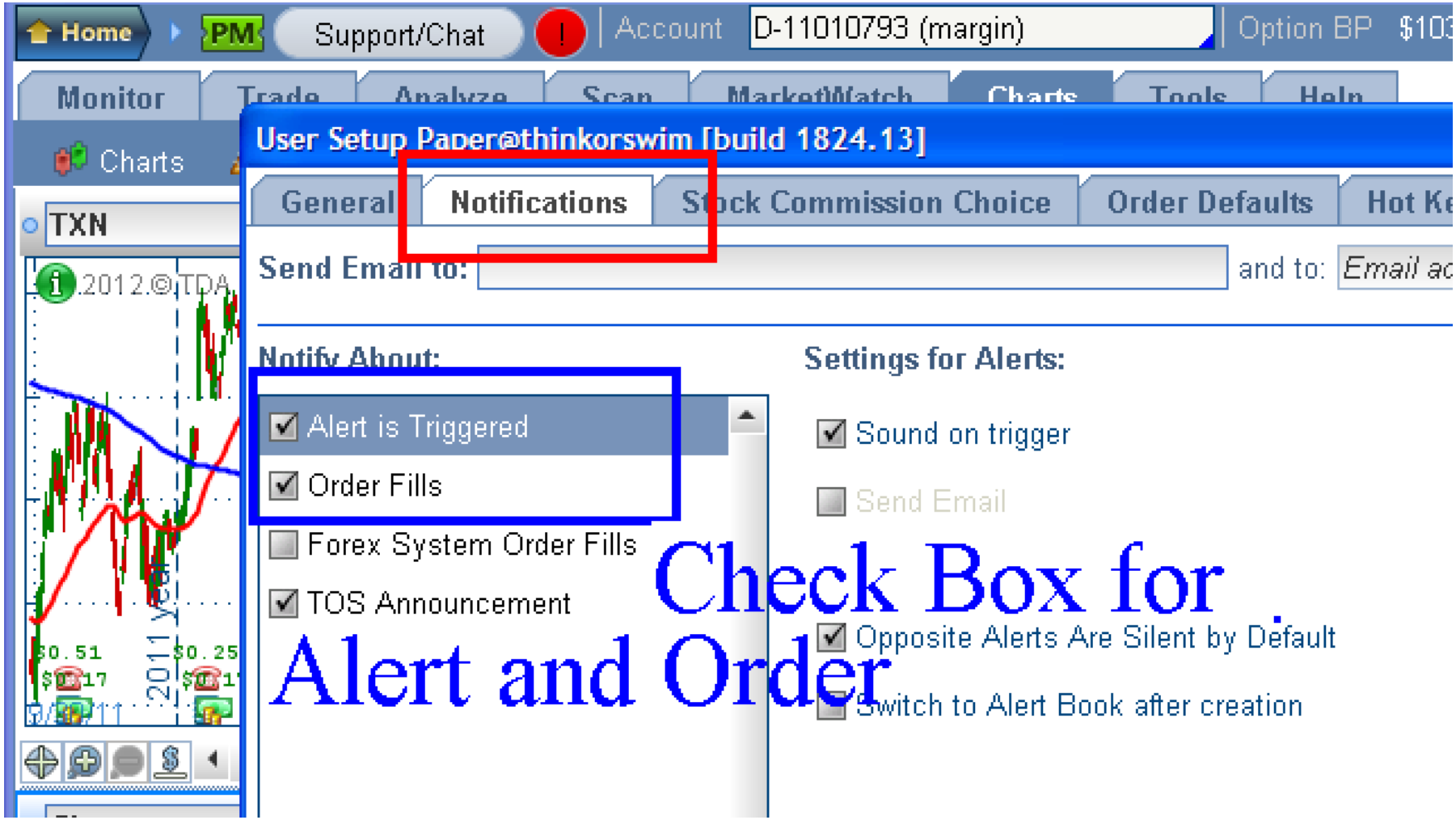
Application Settings

'Tick' these boxes for Alerts & Orders Notification



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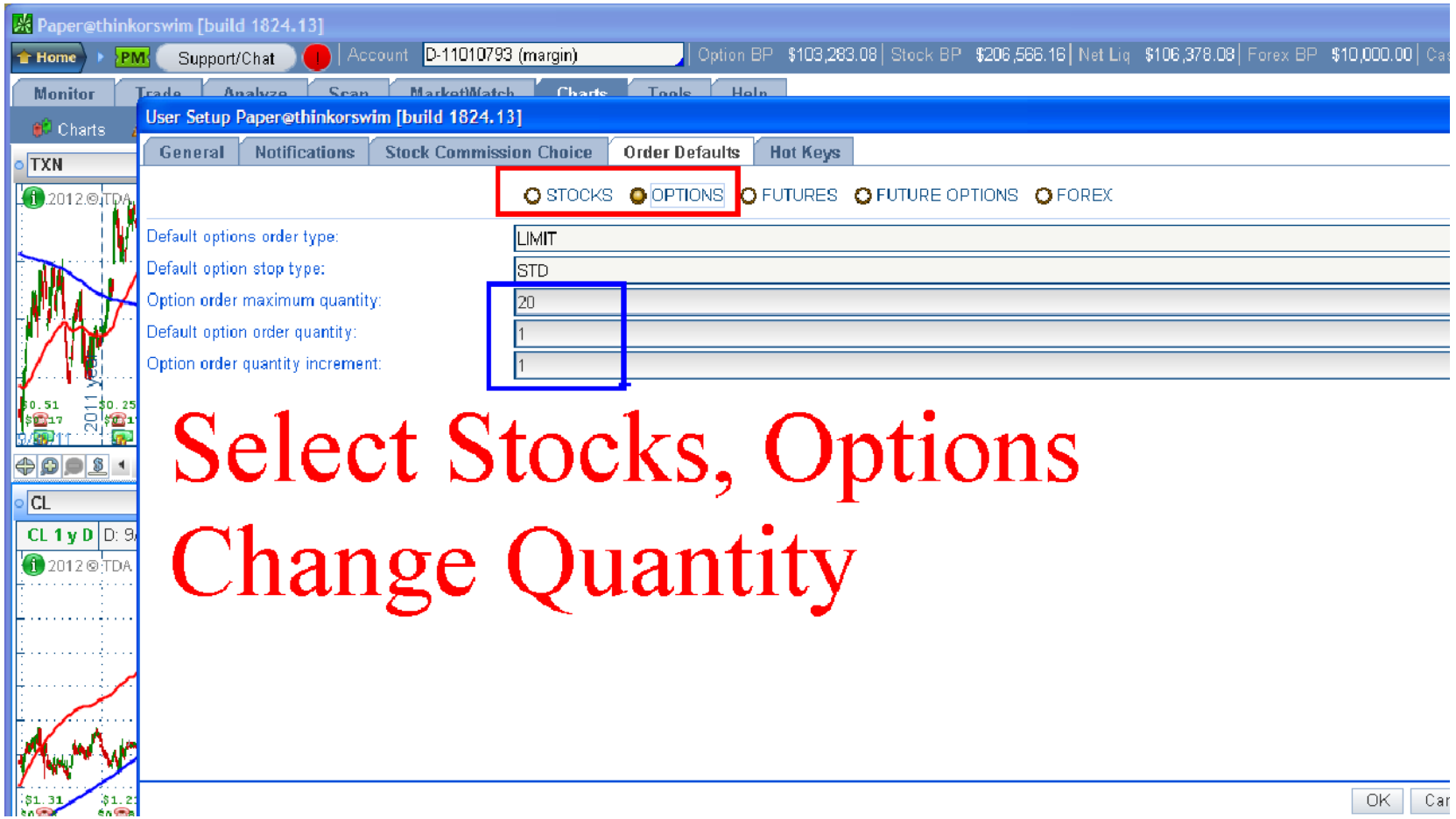
Application Settings

Change the Stocks & Options contract sizes respectively to Avoid mistakes during order entry



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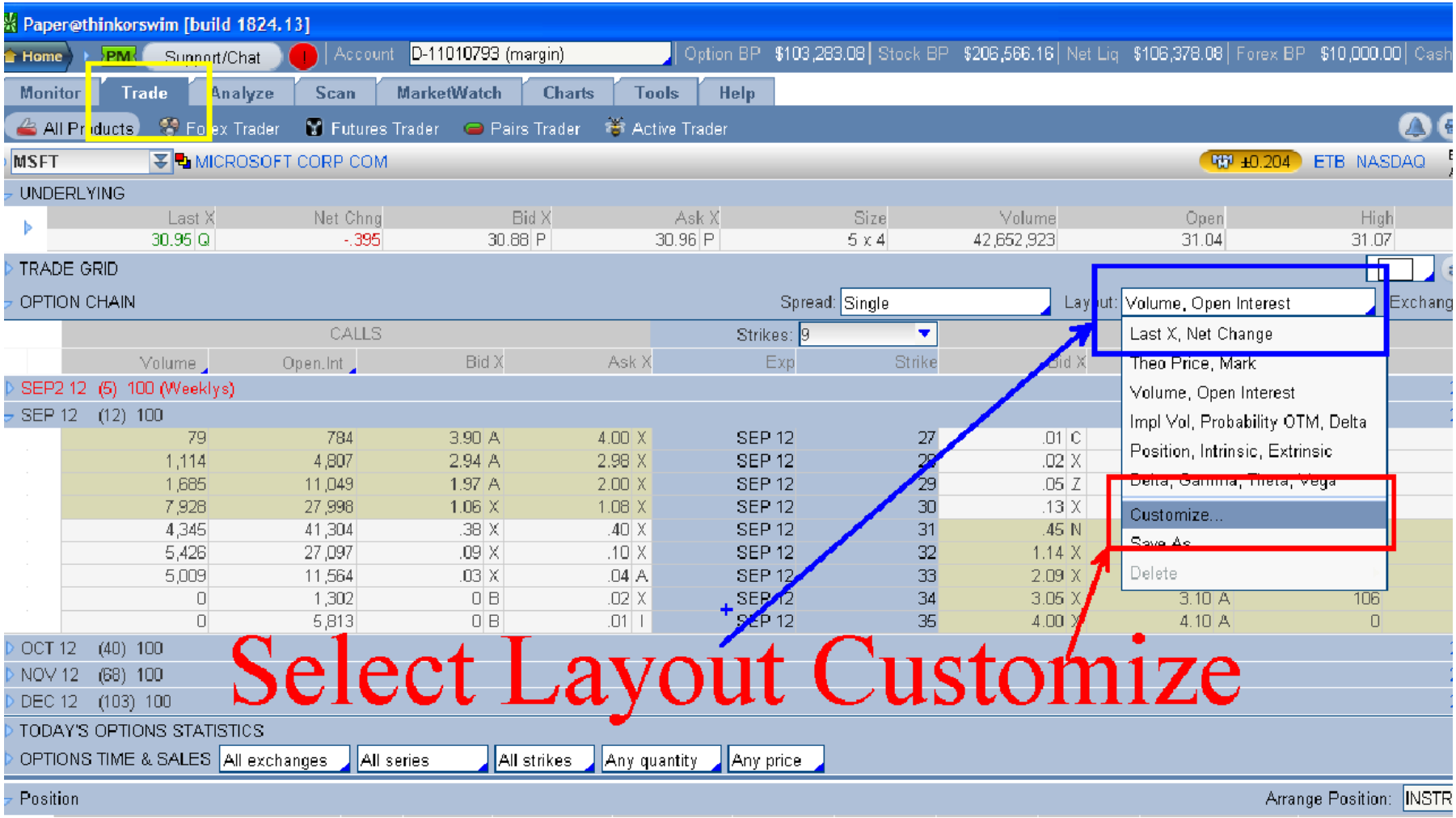
Trade Tab

Change Layout to show required columns



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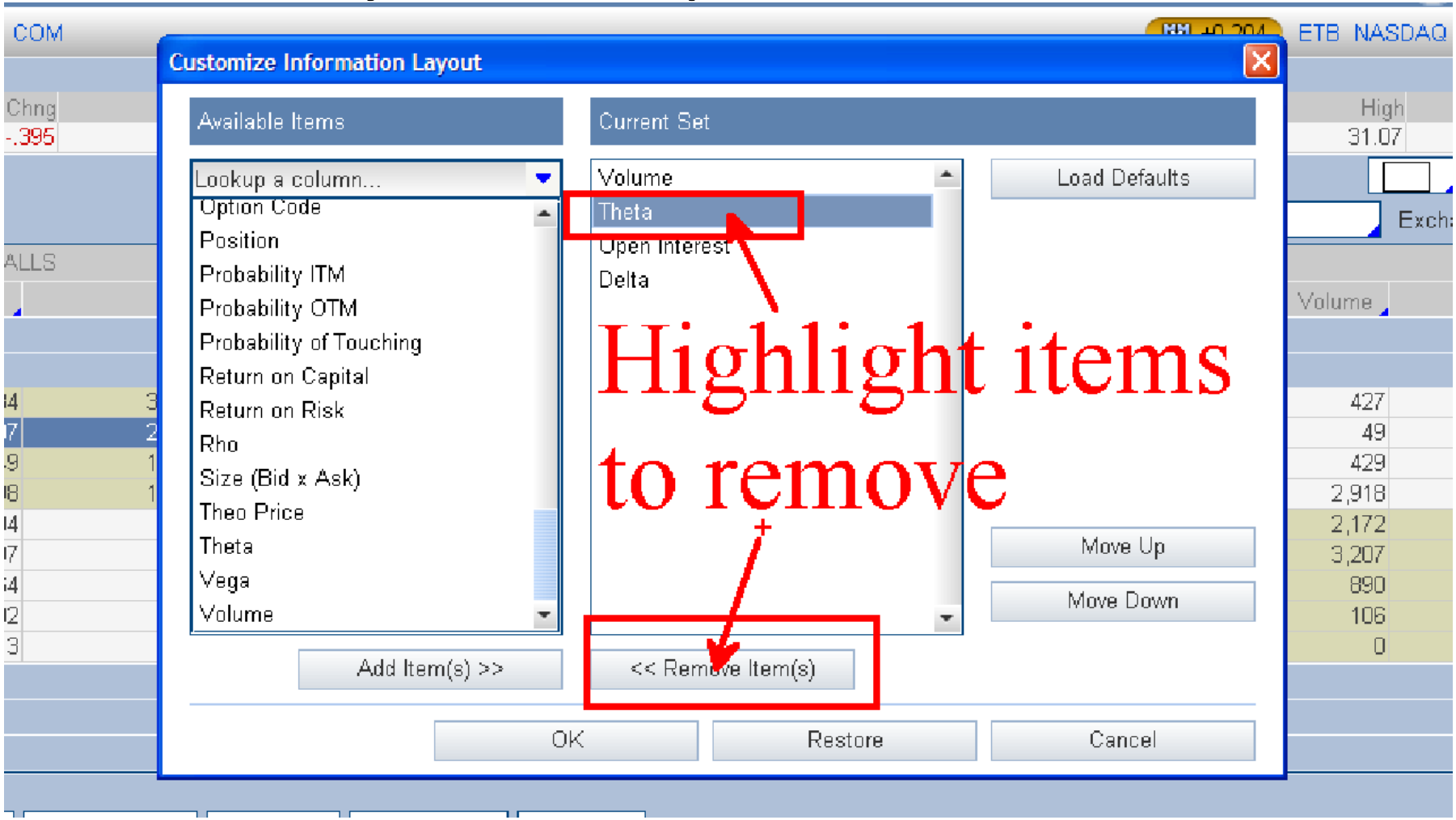
Trade Tab

How to Add or Remove Description in Layout

Only have Delta, Open Interest & Volume



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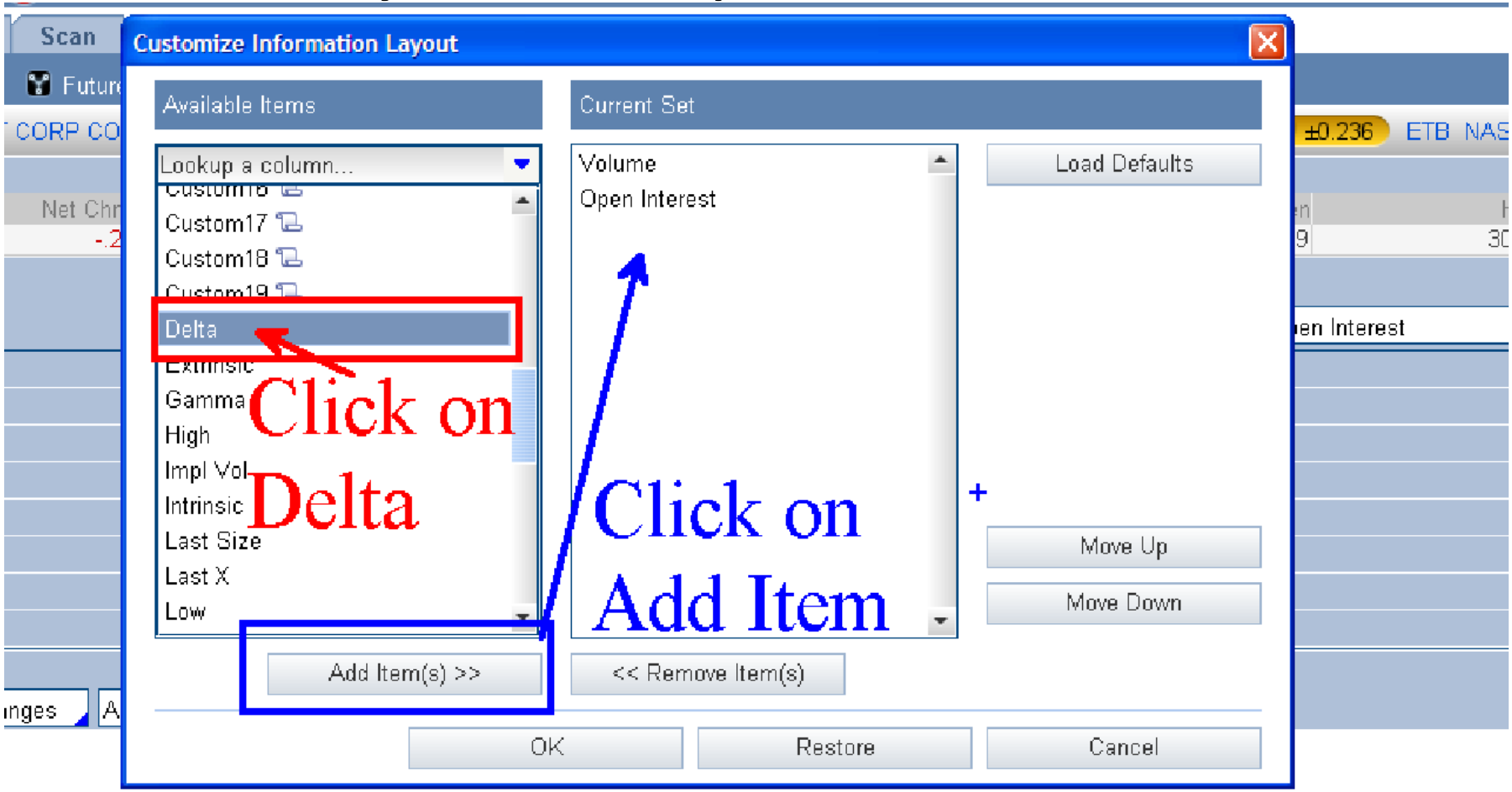
Trade Tab

How to Add or Remove Description in Layout

Only have Delta, Open Interest & Volume



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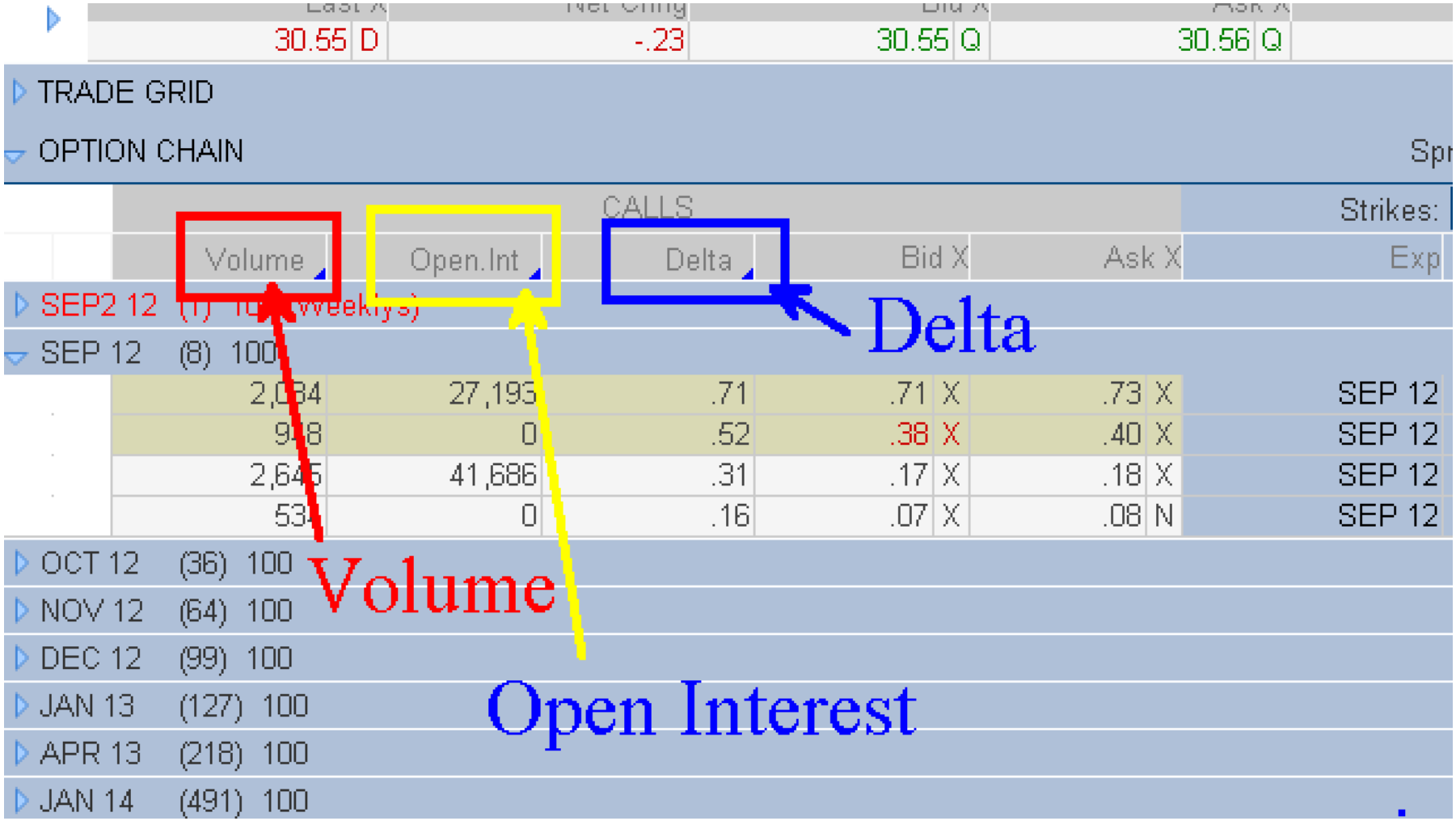
Trade Tab

Option Chain Layout Changed



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Monitor Tab: Activity & Positions
Add New Description

- For Changing & adding description in Activity & Positions
- You would need to have an open trade
- So do ensure you have an Open Trade position by entering a trade
- Otherwise skip this step till you have an open position in your Demo account

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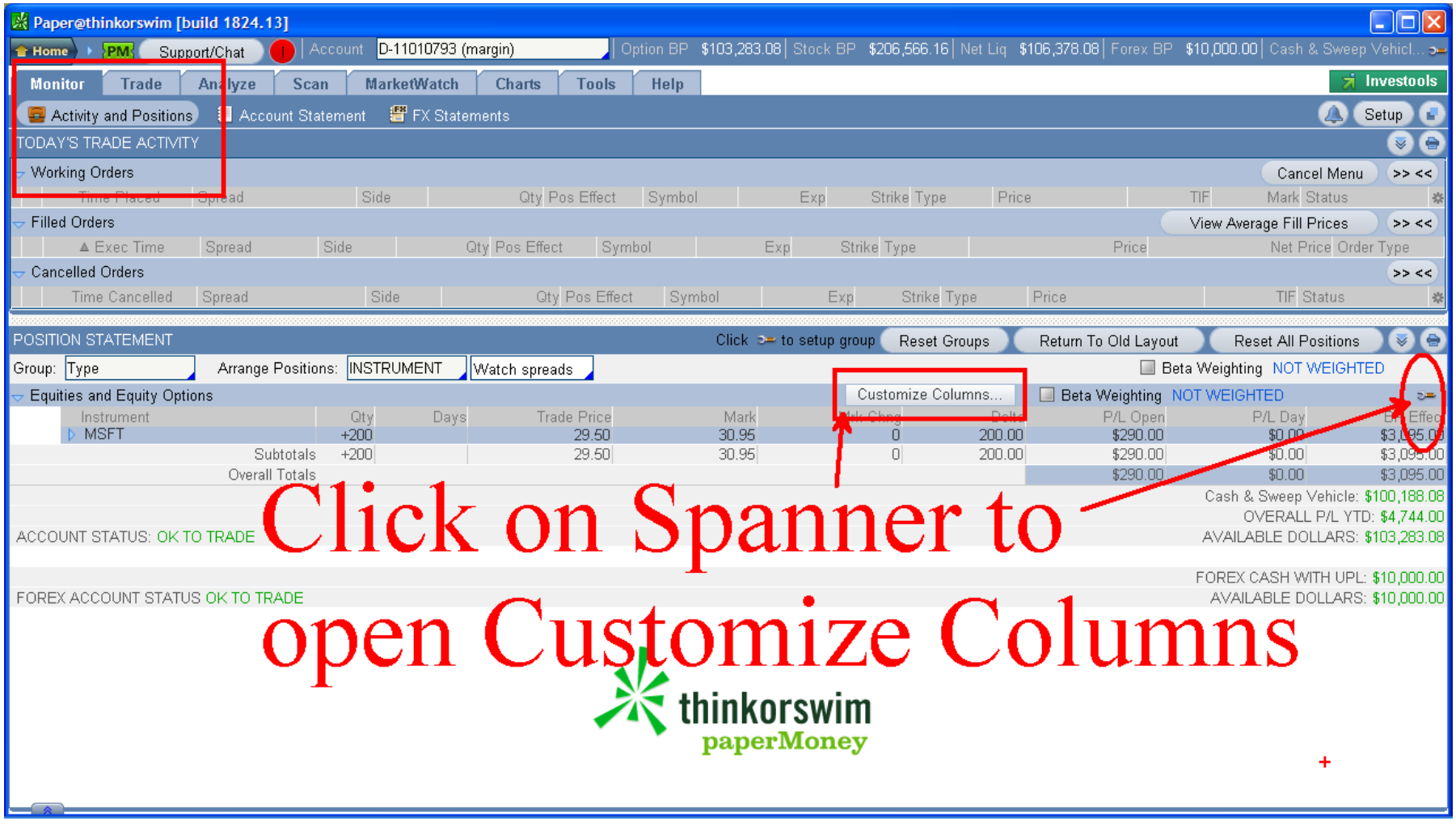
Monitor Tab: Activity & Positions
Add New Description



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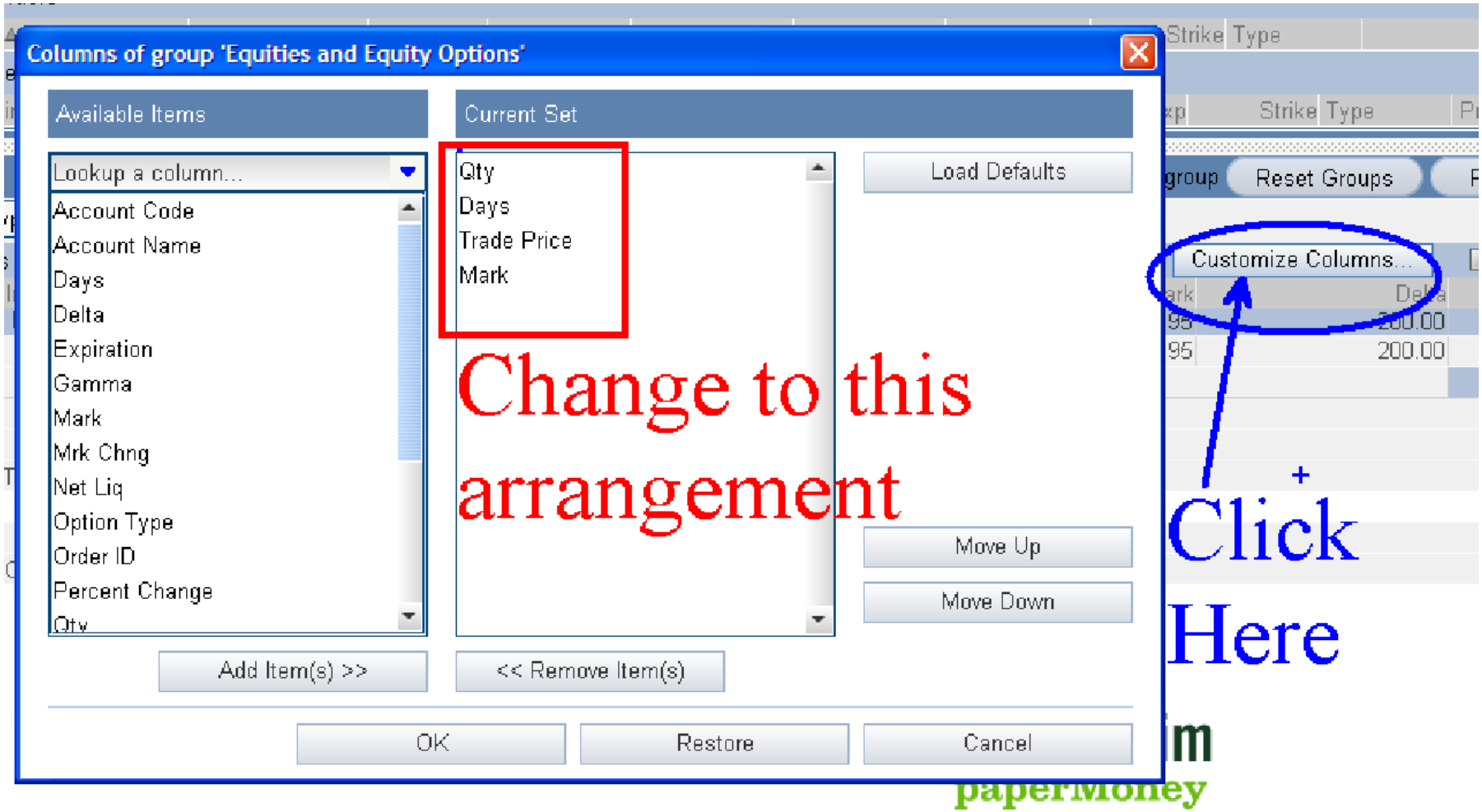
Choose "Qty, Days, Trade Price, Mark"



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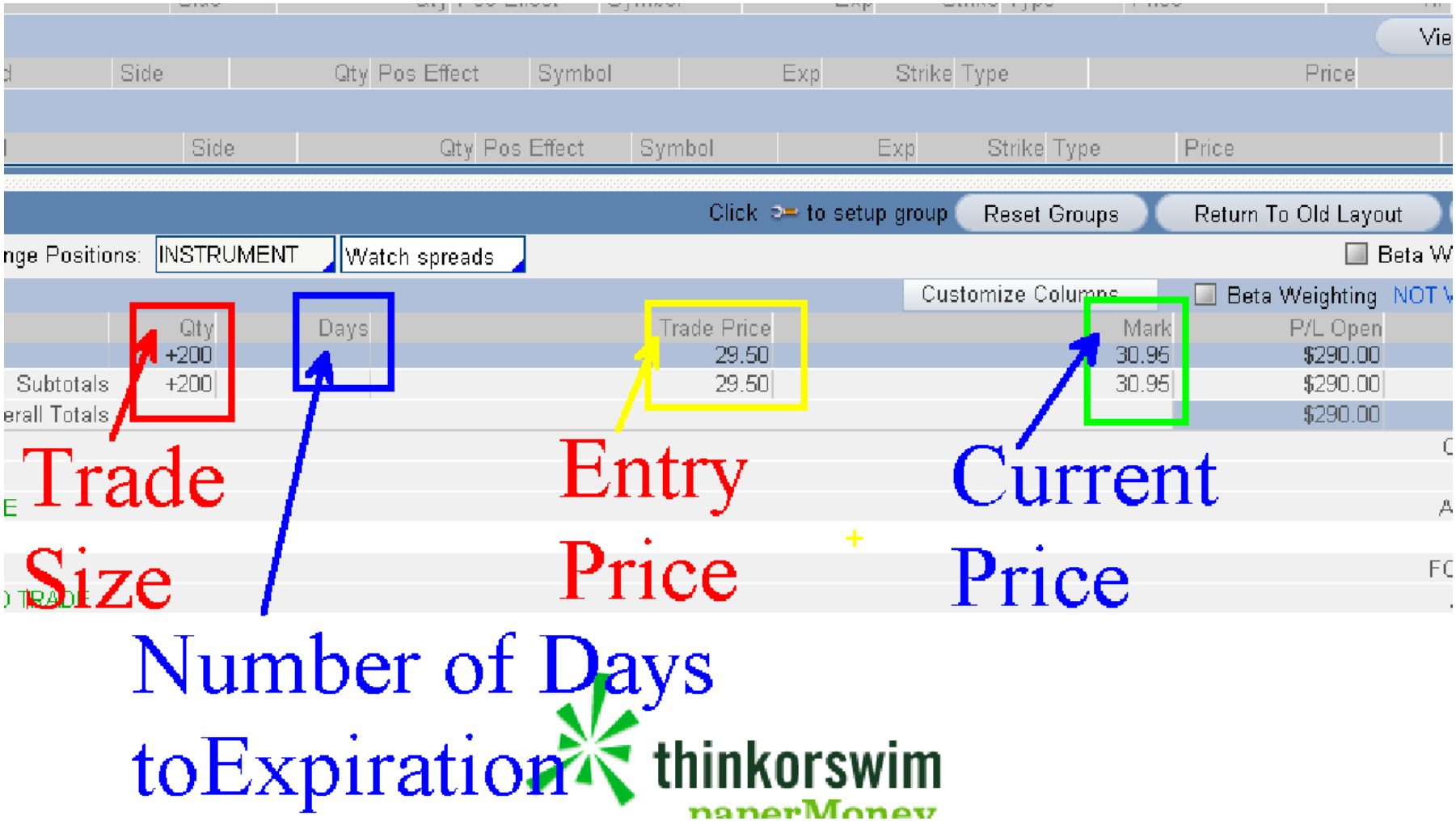
Open Positions with new line items



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How to Buy Stock with OCO Bracket Order

- We will refer to the “How To TOS” in the Face Book under Files & Reference & Watchlist
- Click on the weblink
- http://goo.gl/v3c0b

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Beyond Insights Face Book Options Traders Group

Reference & Watchlist

By Terence Teoh and Kathlyn Toh in Beyond Insights Options Traders Group (Files) ·
Edit Doc

Click here to download Link

Here's the Stock Watchlist fil... http://goo.gl/T9KPn

Here's the Reference on How to Use TOS to enter Options Trade (for Power Options)
http://goo.gl/v3c0b

please bookmark it

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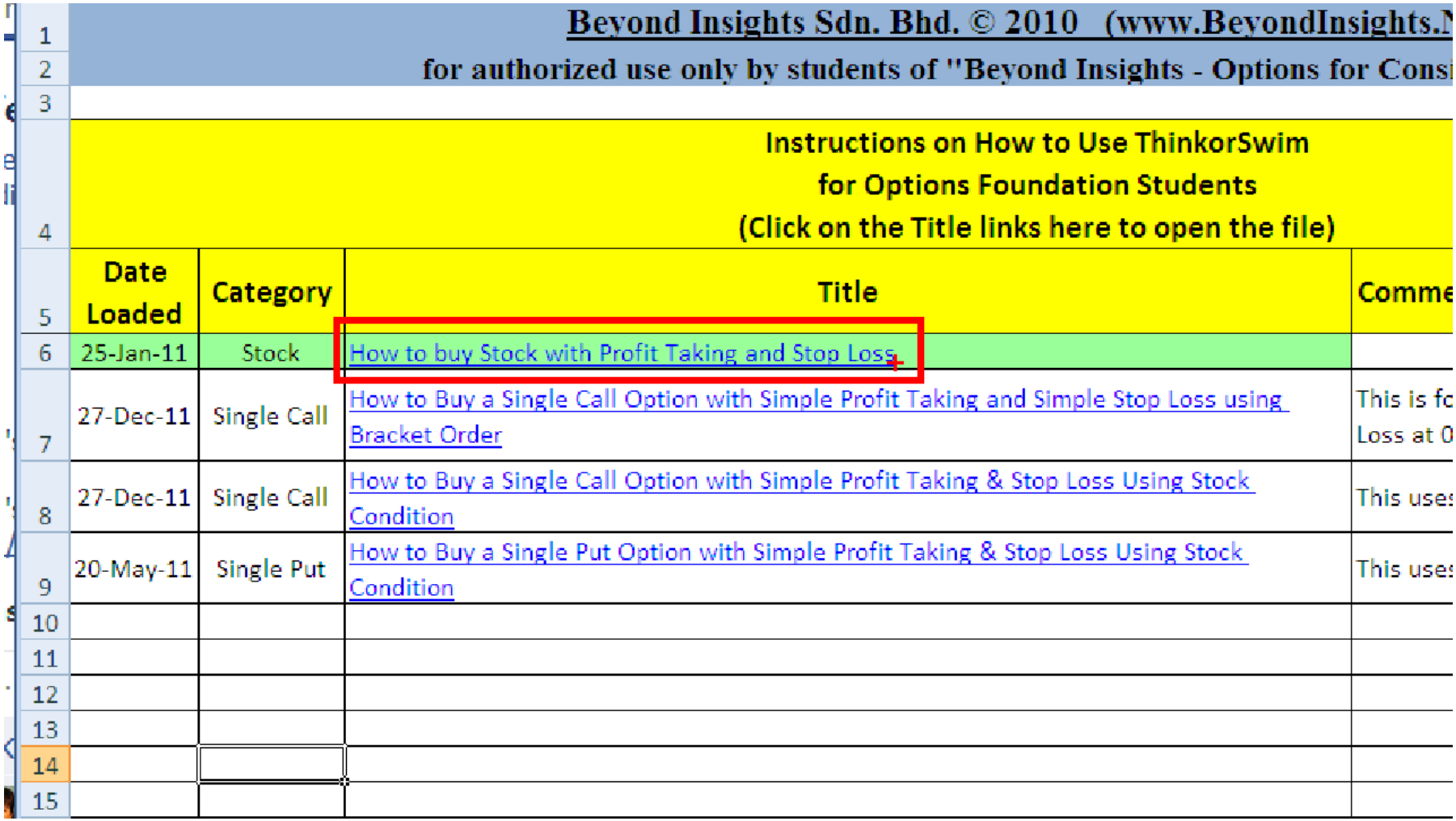
Click on File to download the Instructions



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2	for authorized use only by students of "Beyond Insights - Options for Consi		
3			
4	Instructions on How to Use ThinkorSwim for Options Foundation Students (Click on the Title links here to open the file)		
5	**Date Loaded**	**Category**	**Title**	**Comme**
6	25-Jan-11	Stock	How to buy Stock with Profit Taking and Stop Loss	
7	27-Dec-11	Single Call	How to Buy a Single Call Option with Simple Profit Taking and Simple Stop Loss using Bracket Order	This is fo Loss at 0
8	27-Dec-11	Single Call	How to Buy a Single Call Option with Simple Profit Taking & Stop Loss Using Stock Condition	This uses
9	20-May-11	Single Put	How to Buy a Single Put Option with Simple Profit Taking & Stop Loss Using Stock Condition	This uses
10				
11				
12				
13				
14				
15				

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