Thomson ONE Wealth

Flex Quote

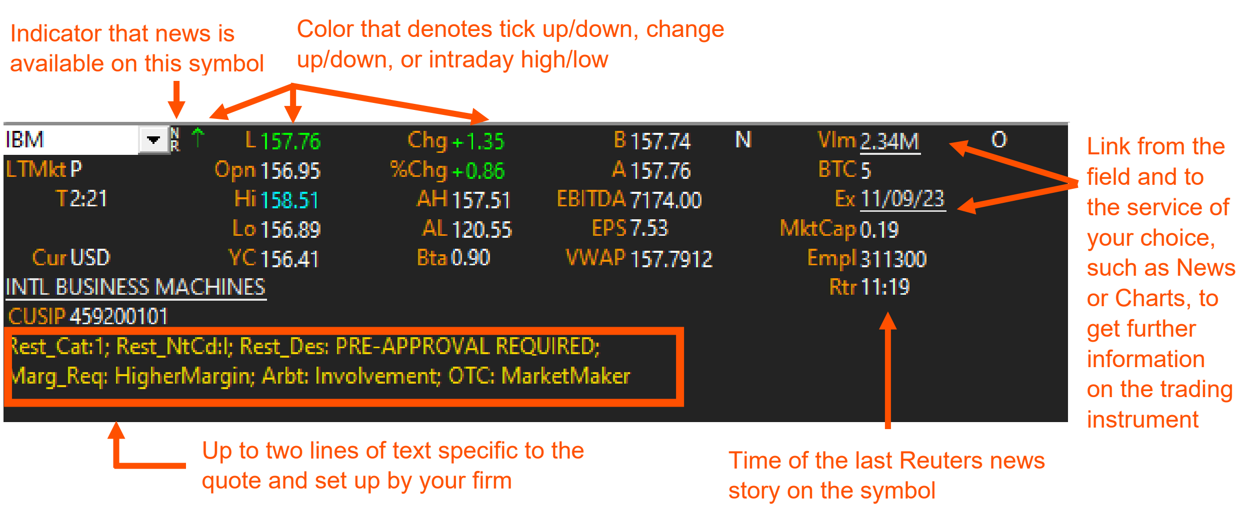
Flex Quote provides an overview of a single trading instrument with –

- Comprehensive market data
- Layouts specific to trading-instruments
- Links to further information and context in Thomson ONE
- Ability to get alerts on the trading instruments that you follow

Available trading instruments

- Bonds
- Forex
- Futures
- Futures options
- Indices
- Market stats
- Money market funds
- Mutual Funds
- Options
- Stocks
- Treasuries
- Warrants

Sample Layout for a Stock



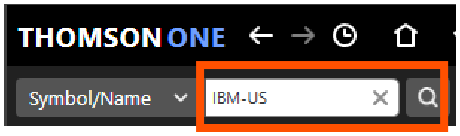
View and Understand a Quote

You can see a quote with the default fields and layout set by Refinitiv or your administrator. Whether a field displays data for a particular instrument depends on the market, location, and venue on which the instrument is trading or listed.

Get a Quote

- Type a symbol in the upper-left corner of Thomson ONE, or double-click a symbol in Flex Monitor.

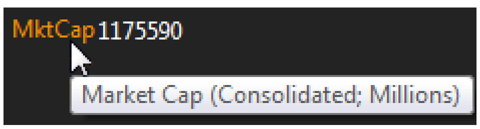
LSEG DATA & ANALYTICS



A quote appears for the symbol.

Understand a Quote

- To understand the fields in the resulting quote, point to the field to see a tooltip with the full name. (Has to be set in Properties.)



- To see definitions for all the fields, press F1 for help.

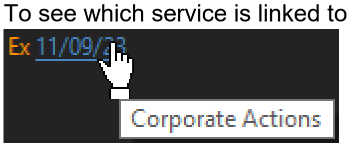
Get More Context on a Trading Instrument

Flex Quote can be your launching point when researching a trading instrument. You can link from fields in Flex Quote to other services in Thomson ONE. For example, you can link from the Volume (Vlm) field in Flex Quote to Thomson Charts Advanced to gain further context on the level of volume throughout the day or over a specified time period.

Link to Other Services in Thomson ONE

- Click or double-click an underlined field.

To see which service is linked to the field, point to the underlined field.

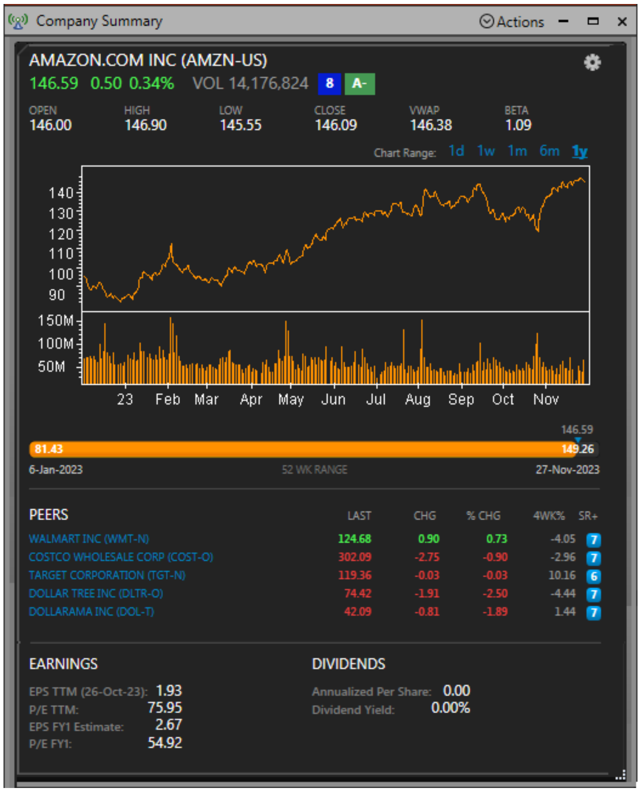


You can get a company summary on an equity for further context on the performance and peers of an equity.

Get a Company Summary for an Equity

- When you are looking at an equity in Flex Quote, right click, and click Company Summary.

  Company Summary opens with an overview of the company, including peers.

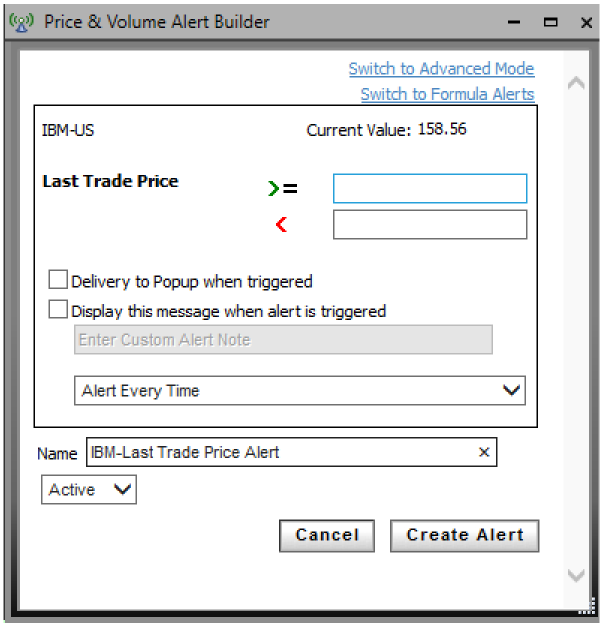


Get Alerts to Stay on Top of Critical Information

You can set an alert on a trading instrument so that you can stay on top of critical information and act immediately.

When you set an alert on a trading instrument, it is always set – even when the trading instrument is not displayed in Flex Quote any longer. If the alert triggers while you are viewing another trading instrument in Flex Quote, you will still see it in Alerts Inbox, and the bell in the upper-right corner of Thomson ONE turns red.

1. In Flex Quote, right-click a value in the field that you want to monitor for the symbol that you are viewing > **Set Alerts**.
2. Type or select criteria.

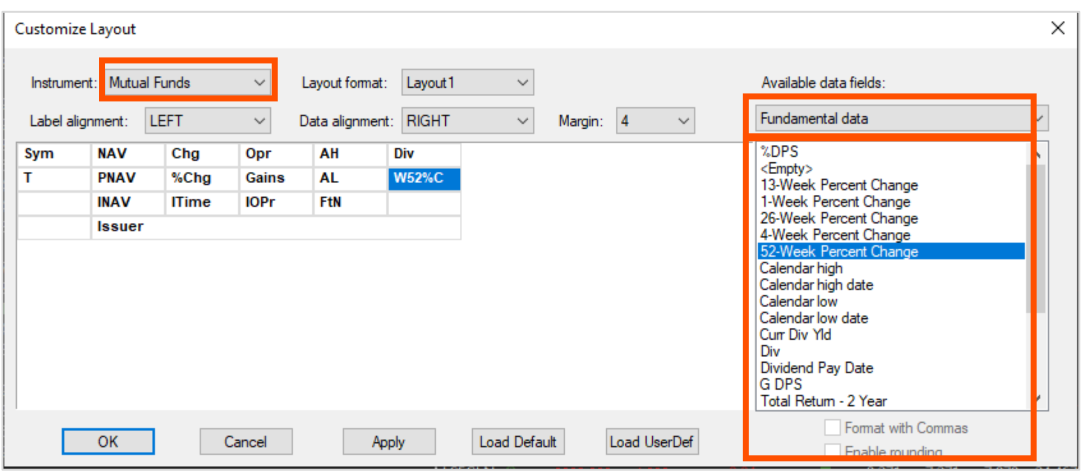


3. To apply additional criteria or change the field, click **Switch to Advanced Mode**, type or select changes, and click **Save**.
4. Click **Create Alert**.

For further information on Alerts, refer to the Alerts Component Guide.

Customizations

The default view for a quote displays the most popular fields or administrator-determined fields for that type of trading instrument. To make it more relevant to you, you can change or add fields by customizing the layout.



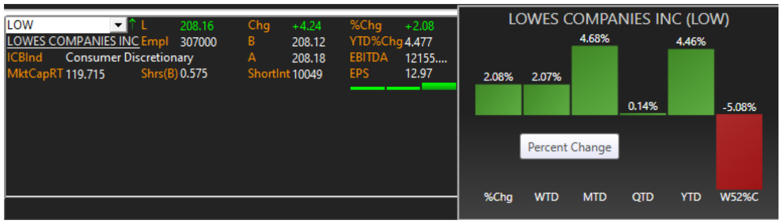
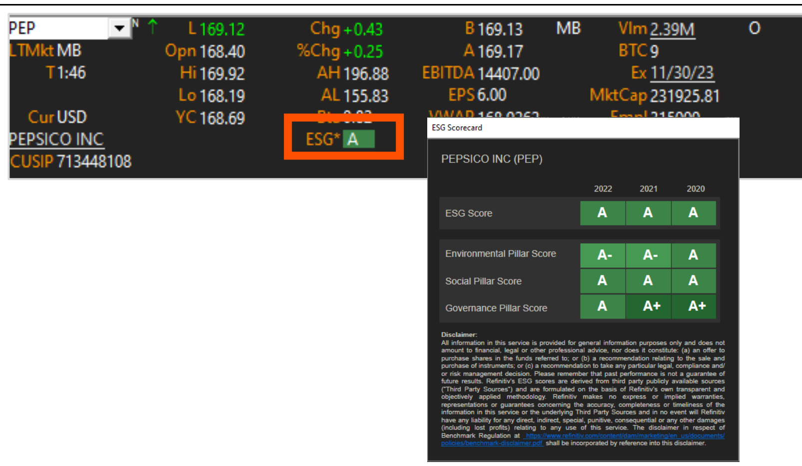
Learn about Available Fields

- Go to Flex Quote, and press F1 for help.

See the Data Points that you Want

1. In Flex Quote, right-click > **Customize Layout**.
   If a layout has the word (Seed) next to it, an administrator created it. You may use that layout or one of your own.
2. From the **Layout format** drop-down list, select a layout.
3. Click **OK**.

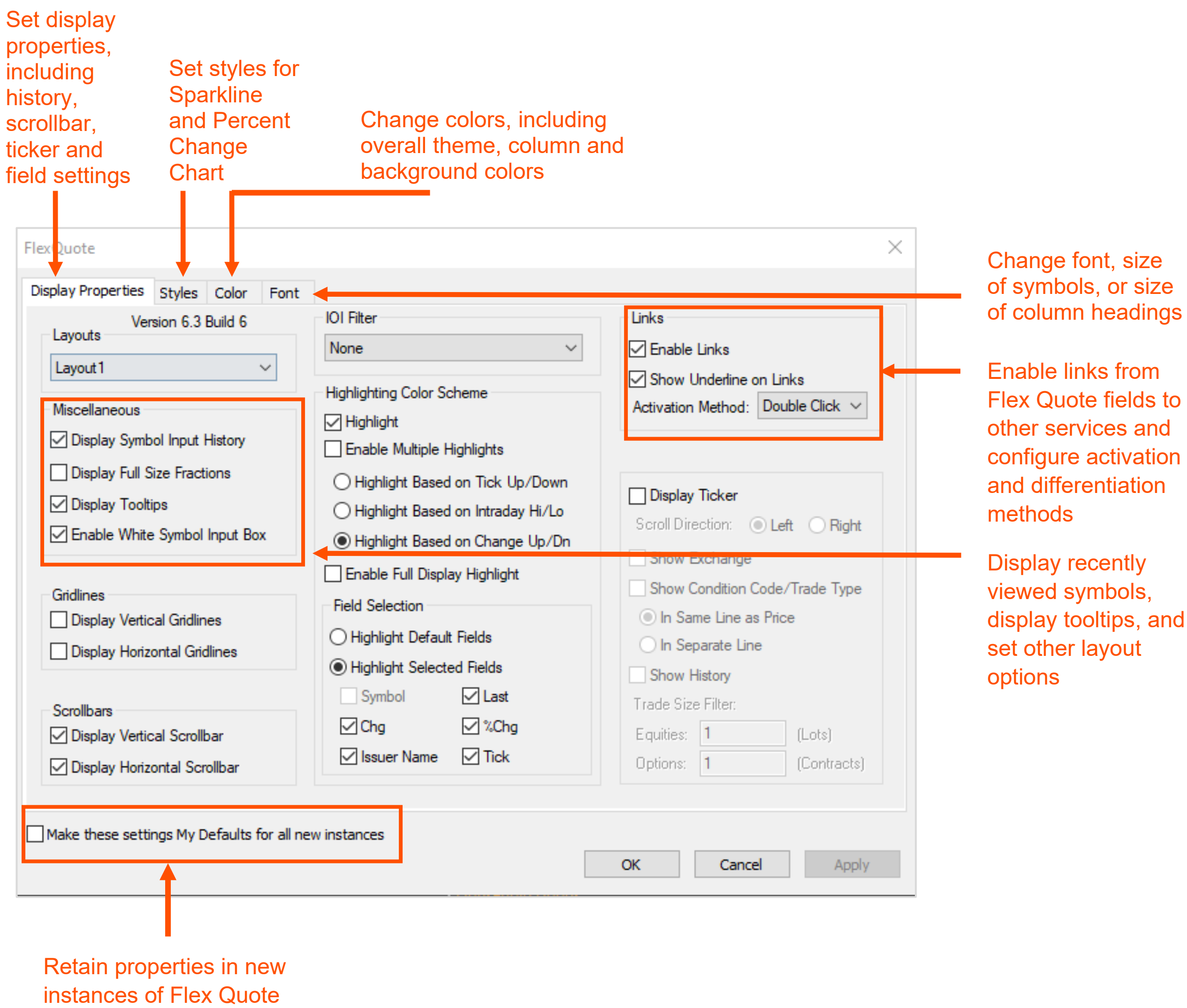
Examples of Graphical Fields for a Stock

Field	What you see	Additional information
Percent Change Chart (Multiple Periods)		From left to right, the bars are – - percent change - week-to-date - month-to-date - quarter-to-date - year-to-date - 52-week percent change To make the chart pop up when you point to it, right-click in the display **Properties** > **Styles** tab > **Enable %Change Chart Pop-Up**.
SparkLine Chart (Last 20 Trades)		- To make the sparkline pop up when you point to it, right-click in the display > **Properties** > **Styles** tab> **Enable Chart Pop-Up on SparkLine Hover** A chart appears with price, volume if available, and data by one day (1d), one week (1w), one month (1m), six months (6m), or one year (1y). Click a time frame to see its chart.
ESG (Environmental, Social, and corporate Governance) Score		To view the overall score and the pillar Environmental, Social and Governance scores for the last three years, point to the score

Change how the Display Looks and Behaves

To make most changes to the appearance of the display, right-click > **Properties**. For a complete list of properties, press F1 to access help. When publishing the workspace for the first time, the seed administrator sets the properties. After users save the workspace, they own their own properties and can overwrite them.

Each instance of a service in the workspace has its own preferences. Replacing an instance of a service in the workspace removes all preferences related to that instance of the service. Do not replace an instance of a service in the workspace unless you are prepared to lose all preferences related to that instance.



Learn More

Learn More

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Documents on My Account

- Thomson ONE Desktop – Quick Reference Card
- Thomson ONE Anywhere – Quick Reference Card
- Commonly used symbols on Thomson ONE
- Exchanges available on Thomson ONE

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– **Option 1:** Content and functionality
– **Option 2:** Password resets
– **Option 3:** Technical assistance
– **Option 4:** Other requests

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