Toolkit 6 User Group Webinar
by Doug Gerlach, gerlach@iclub.com
10/6/2020

Keyboard Shortcuts & "Hidden Features" in Toolkit 6

by Doug Gerlach
President, ICLUBcentral Inc.
October 2020

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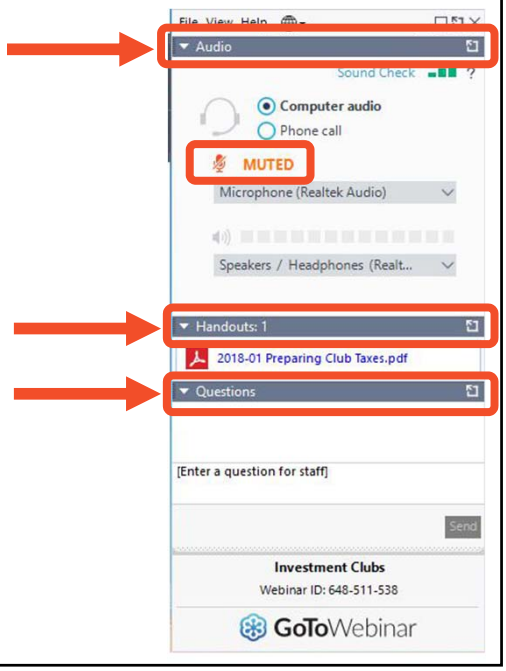

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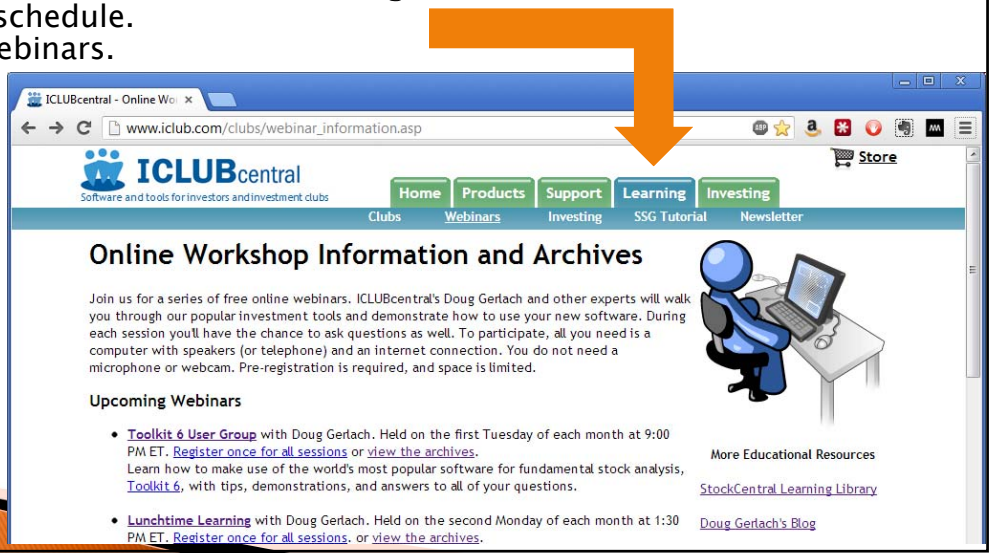

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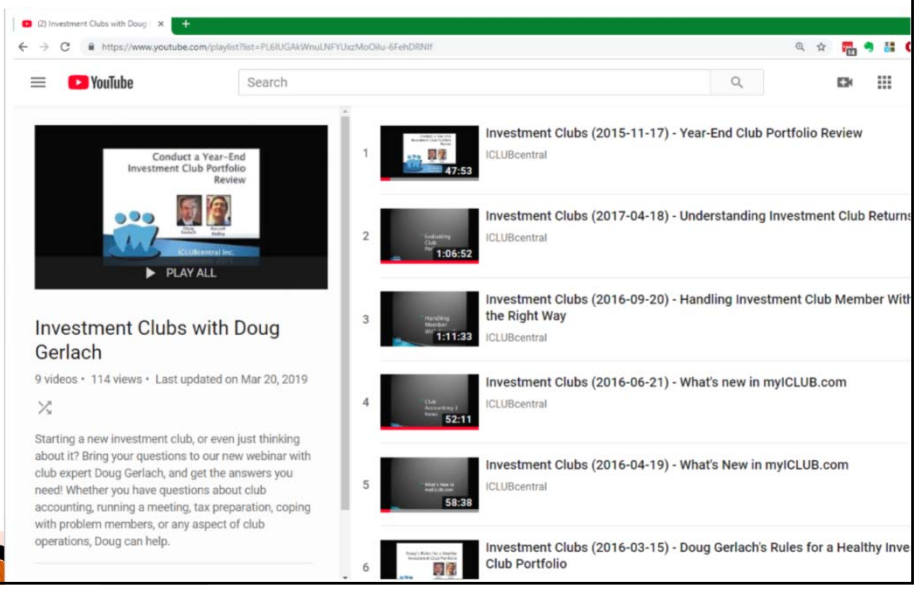

Keyboard Shortcuts & "Hidden Features" in Toolkit 6

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Standard Navigation Keys

- F1 : Help.
- Ctrl+S : Save Stock Study.
- Ctrl+P : Print.
- Ctrl+O : Open Stock Study from Library.
- Ctrl+D : Data Window.

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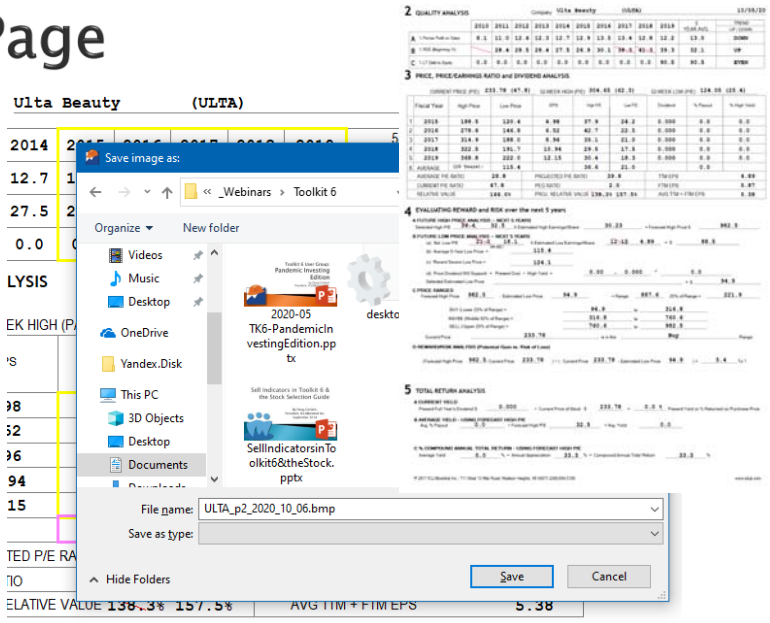
Save BMP of Page

- Press Alt+P to create & save BMP file of any form page.



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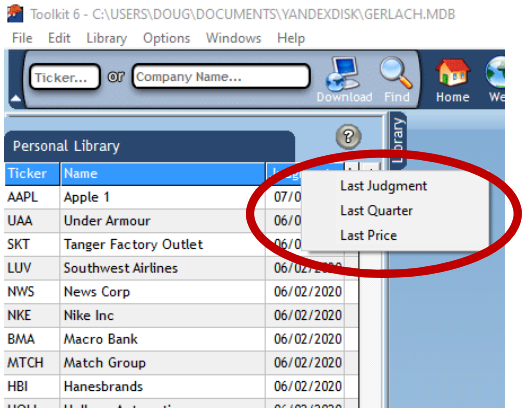
Stock Library & Portfolio

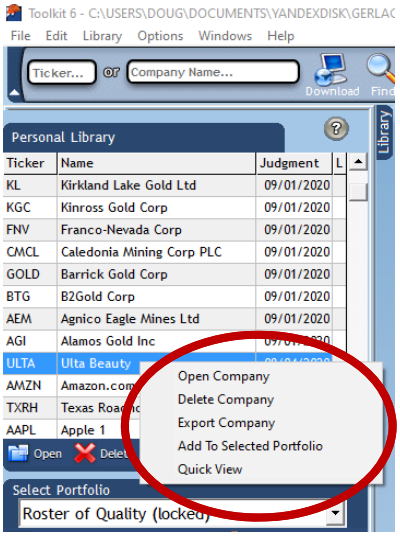
Select Date Sort in Personal Library



- In Personal Library, right-click on Date column header to sort by date of:
  - Last Judgment
  - Last Quarter
  - Last Price
- Hold Shift to sort in reverse order.

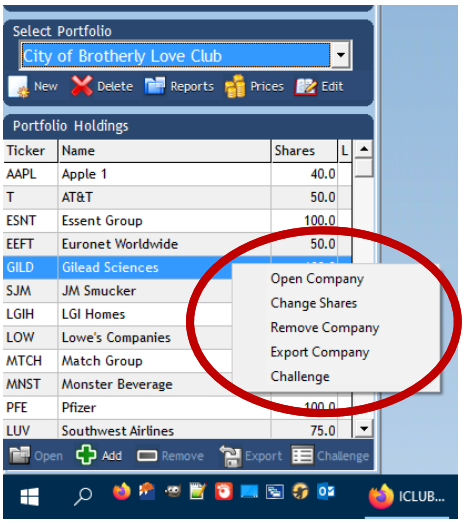
Manage Companies in Library

- Right-click on company name to:
  - Open Company.
  - Delete Company.
  - Export Company.
  - Add To Selected Portfolio.
  - Display Quick View graph.



Manage Companies in Portfolio

- Right-click on company name to:
  - Open Company.
  - Change Shares *(in portfolio)*.
  - Remove Company *(from portfolio)*
  - Export Company.
  - Challenge.



Navigating Between Forms

Navigate Quickly between Forms

- Right-click for pop-up menu, or:

- Stock Study: Ctrl+F1
- Stock Management Guide: Ctrl+F2
- Quarterly Trend: Ctrl+F3
- Annual PE Analysis: Ctrl+F4
- Community: Ctrl+F6

Flip from Back to Front of Forms

- Ctrl+F (as in "Flip").
- Works on:
  - Stock Study.
  - Stock Management Guide.
  - Quarterly Trend Analysis/Report.

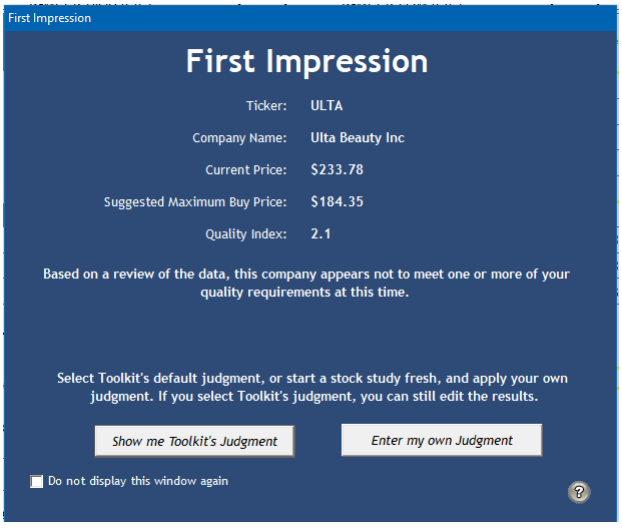
Cycle through Open Stock Studies

- Can open 9 stock studies at once.
- Press Ctrl+Tab to cycle to next study.
  - Also cycles through Portfolio Home Page (if open).
- Press Ctrl+F4 to close active stock study (will prompt to save if unsaved).

Stock Study

Display First Impression

- Ctrl+Alt+I ("I" as in "Impression").
- Works on front or back of Stock Study.
- Favors consistently-growing companies & denigrates inconsistent or overvalued companies.



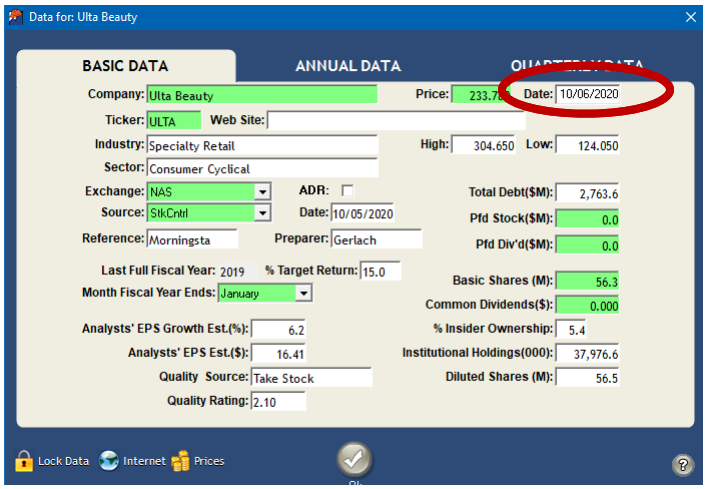
Apply Default Judgment

- Ctrl+Alt+D.
- Works on front or back of Stock Study.
- Applies conservative set of rules to determine EPS & revenue growth rates, future high & low P/Es, future low price.

- Ctrl+Alt+E applies judgment based on mathematical values only (subject to some limits on maximum values used).

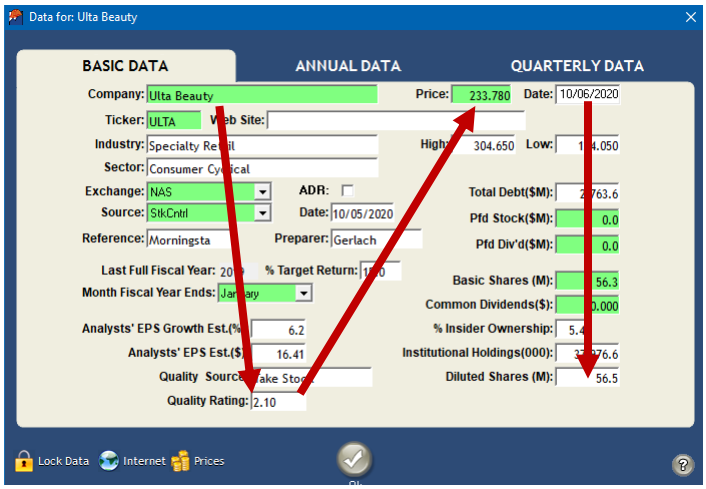
Setting Date in Data Window

- Add or subtract month: PGUP or PGDN.
- Add or subtract day: Up or Down Arrow.
- Insert today's date: Home.



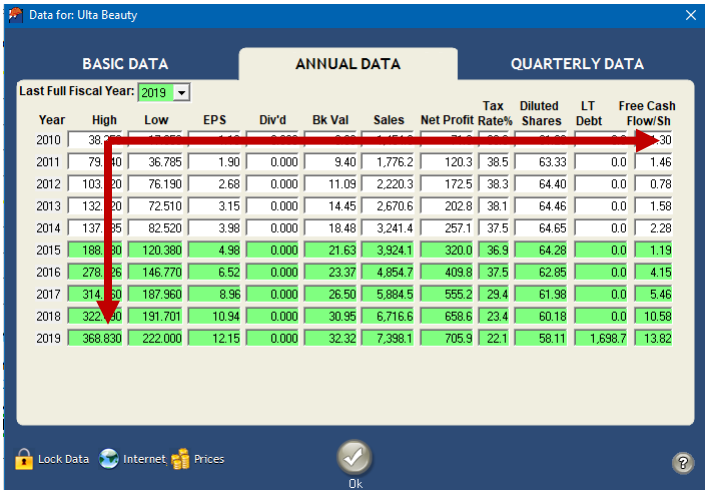
Navigate Basic Data Fields

- Tab or Enter moves down.
- Shift+Tab or Shift+Enter moves up.



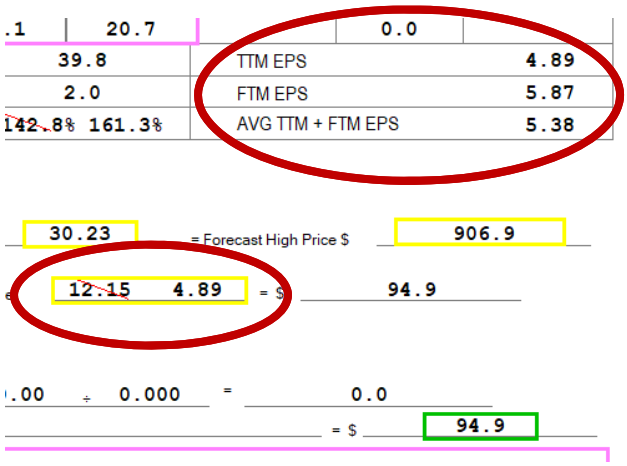
Navigate Annual & Quarterly Data Fields

- Tab moves across row, Shift+Tab moves backwards in row.
- Enter moves down column, Shift+Enter moves up column.



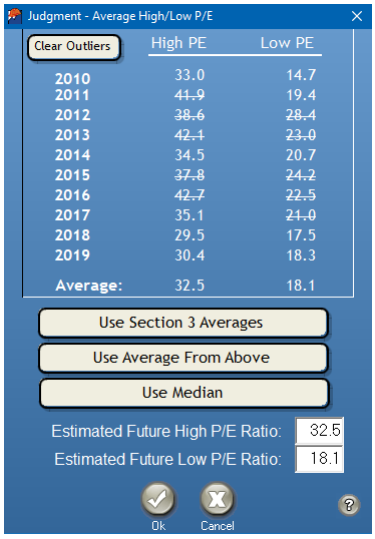
Change Estimated Low EPS

- On back page of Stock Study, press Alt+Q:
- Toggles Estimated Low EPS in Section 4 between 4 options:
  - Last fiscal year.
  - TTM.
  - FTM.
  - Average of TTM+FTM.



Choose Average of Lowest 10+Yr P/Es

- In Section 4's "Judgment + Average High/Low PE" window, press Alt+M.
- Calculates average of 5 lowest low P/Es & 5 lowest high P/Es.



Switch Between 5-Yr & 10-Yr Average P/Es

- Press Alt+K to toggle between using 5 years & 10 years to calculate average high & low P/E ratios.

CURRENT PRICE (P/E) 233.78 (47.8) 52-WEEK HIGH (P/E) 304.65 (62.3) 52

	Fiscal Year	High Price	Low Price	EPS	High P/E	Low P/E
1	2015	188.5	120.4	4.98	37.9	24.2
2	2016	278.6	146.8	6.52	42.7	22.5
3	2017	314.9	188.0	8.96	35.1	21.0
4	2018	322.5	191.7	10.94	29.5	17.5
5	2019	368.8	222.0	12.15	30.4	18.3
6	AVERAGE	(10 Years):	115.4		36.6	21.0

AVERAGE P/E RATIO	29.8	PROJECTED P/E RATIO	39.8
CURRENT P/E RATIO	47.8	PEG RATIO	2.0
RELATIVE VALUE	166.0%	PROJ. RELATIVE VALUE	138.3% 157.5%

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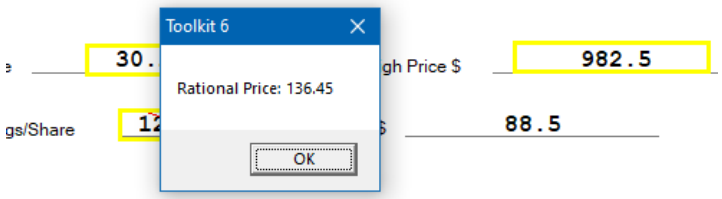
Display Rational Price

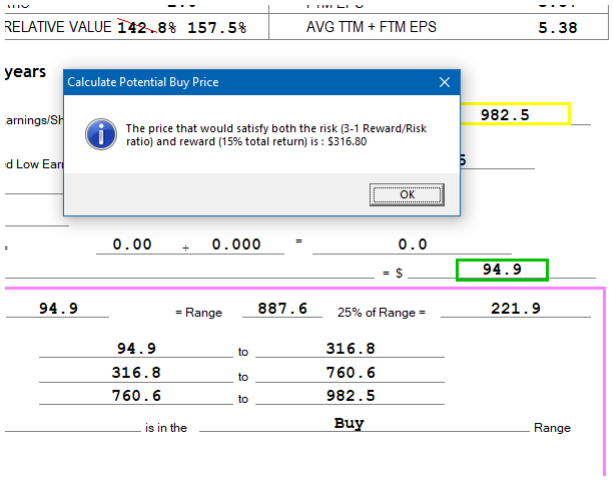
- Press Alt+C.
- This is price if stock was selling at its average P/E Ratio.

ALUE 142.8% 157.5% | AVG TTM + FTM EPS 5.38



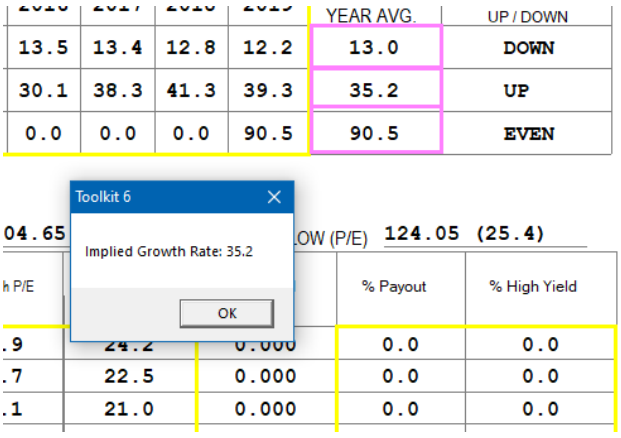
Display Buy Price

- Press Alt+B to display Buy price that satisfies 15% total return goal & 3: 1 U/D ratio.
- Legacy feature dating from deprecated 33/33/33 zoning (not 25/50/25).



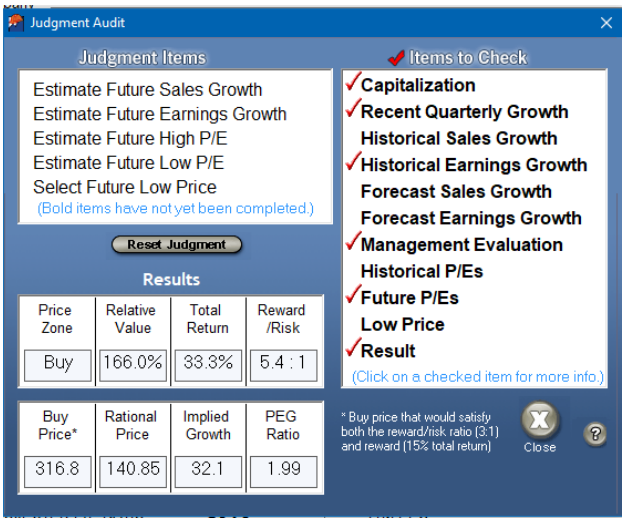
Display Sustainable Growth Rate

- Press Alt+S.
- Theoretical rate at which company can grow using internal resources.
- Determined by Average ROE less dividends.



Begin Judgment Audit

- Press Ctrl+J to review Judgment Audit.



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Questions?

gerlach@iclub.com

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