Flex Monitor

A comprehensive look at company earnings data in one place

Flex Monitor provides an overview of the market or an instrument at a glance. You can create, save, track, and share watchlists and portfolios. You can also select from more than 300 data fields to create customized layouts and sort by any of those fields.

Flex Monitor gives you the power to monitor the symbols that you watch with the data and graphical representations that give the context that you need.

Portfolio Contribution
See the performance of constituents, market segments, and the portfolio as a whole.

Trader Portfolio
Evaluate the performance of your holdings based on purchase price or yesterday's close.

Portfolio Allocation
Reallocate and modify the holdings of a portfolio.

Percent Change Chart
See a graphical representation of the percent change between the current and past prices. You can also see the 52-week percent change.

Price Graph
See the range of daily trading with an interactive graph that shows last trade price tick direction, VWAP, and previous close.

ESG Score
See ratings of a company's Environmental, Social, and Corporate Governance practices, based on publicly available data.
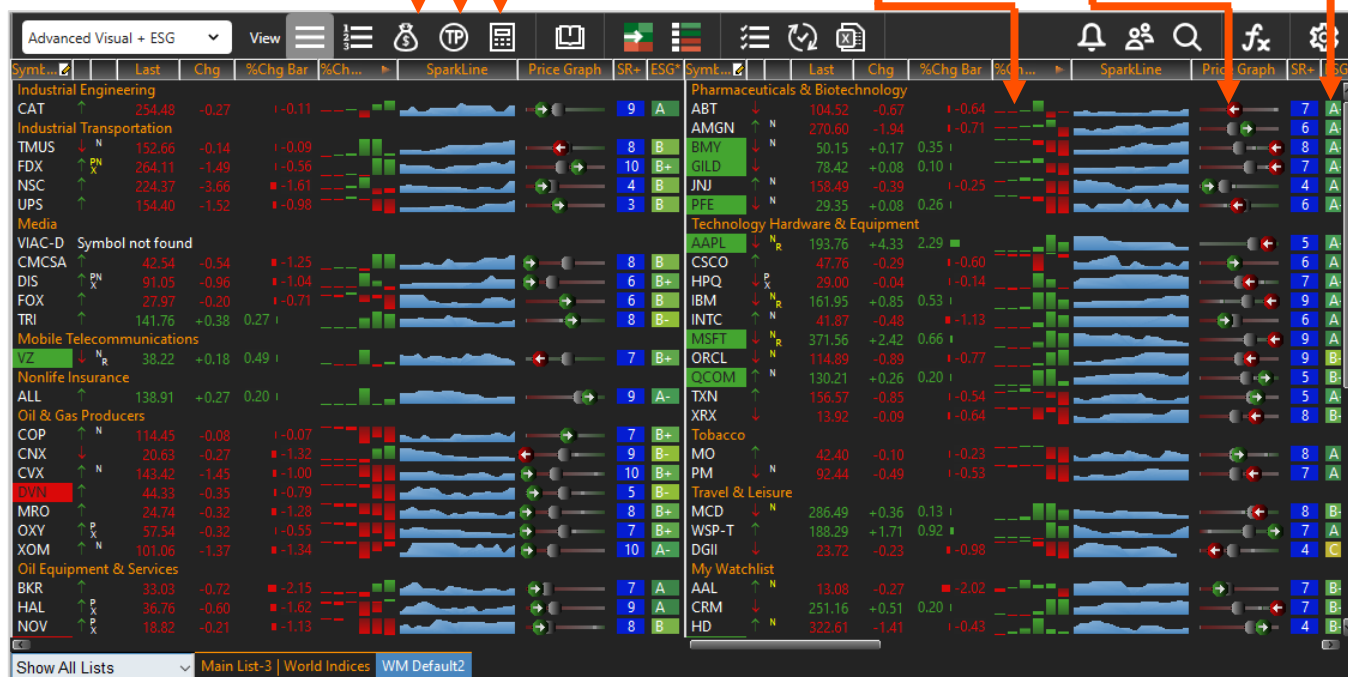
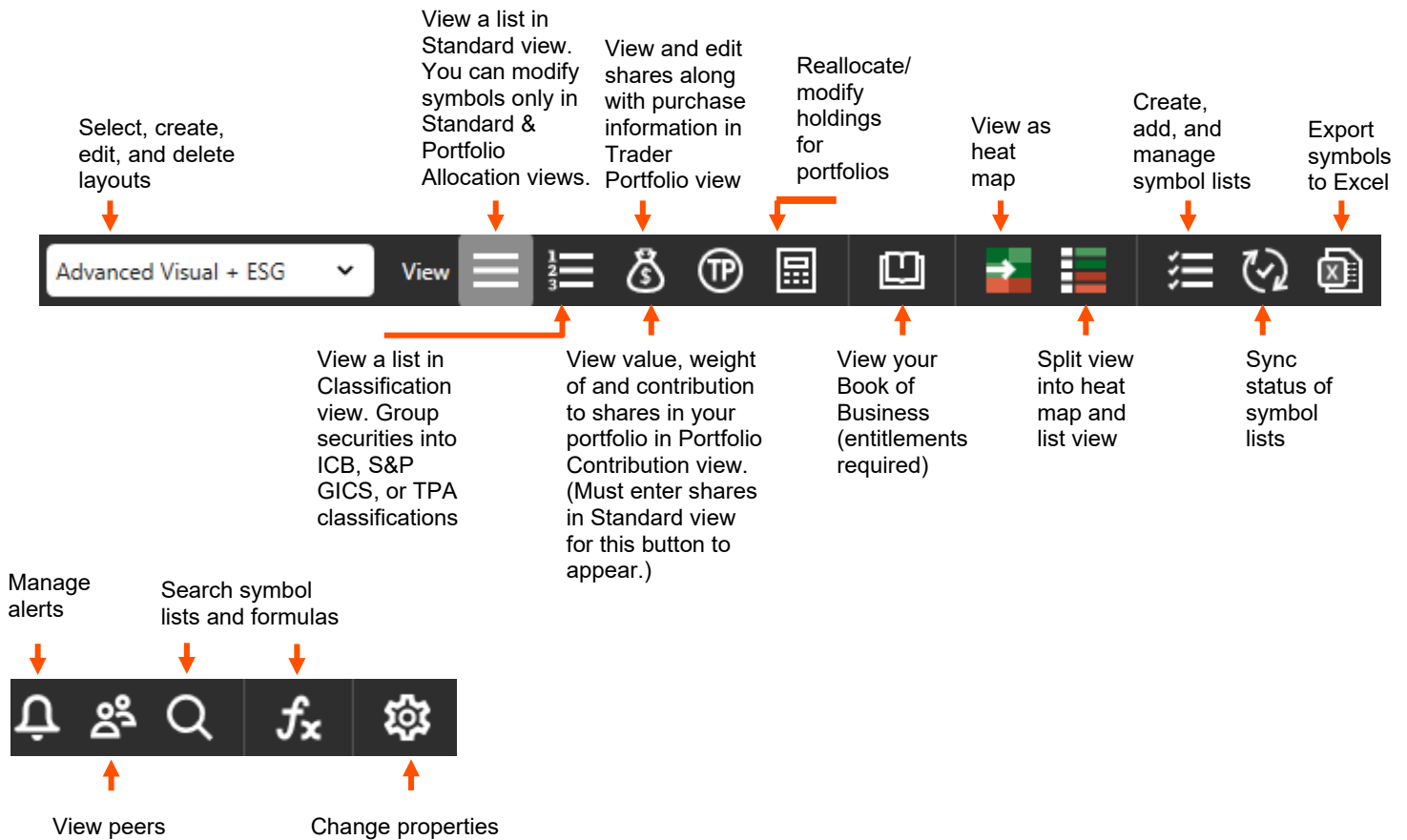
Symbol lists
View your own or shared lists.

Stock Reports Plus Score
See a 1-10 rating of a stock's stability, based on quantitative assessments.

Sparkline
Visualize the last 20 trades with a price line graph.

LSEG DATA & ANALYTICS

Select, create, edit, and delete layouts

View a list in Standard view. You can modify symbols only in Standard & Portfolio Allocation views.

View and edit shares along with purchase information in Trader Portfolio view

Reallocate/ modify holdings for portfolios

View as heat map

Create, add, and manage symbol lists

Export symbols to Excel

Advanced Visual + ESG   View

View a list in Classification view. Group securities into ICB, S&P GICS, or TPA classifications

View value, weight of and contribution to shares in your portfolio in Portfolio Contribution view. (Must enter shares in Standard view for this button to appear.)

View your Book of Business (entitlements required)

Split view into heat map and list view

Sync status of symbol lists

Manage alerts

Search symbol lists and formulas

View peers

Change properties

In Flex Monitor you can –

- Manage your symbol lists and create layouts to display the data that you want to see
- Track the performance of your portfolios and their constituents
- Use your lists in other parts of Thomson ONE

Images shown are for the U.S. default workspace. Location of content may differ by region or firm.

Manage your Symbol Lists

Learn how to create and share lists and how to create a layout to see the data in a display that is relevant to you.

Find and View a Symbol List

1. Click the desired tab beneath Flex Monitor.

| AAPL | N | 95.09 | +0.89 | 0.95 | | | 5.049 |

Show All Lists   Benchmarks Firm Default Sample List
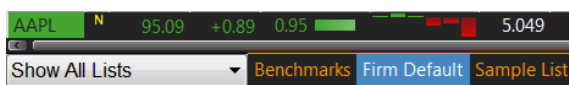
2. If the symbol list is not on a tab, click ☰ on the toolbar.
3. Click **Search for Additional Lists**.
   a. If created in Flex Monitor: **Portfolio Warehouse/Firm Library** tab > type/select criteria.
      To show only lists that you created, select **Show My Lists Only** > **Go** > select list.

b. If created in a different service: **Other Services** tab > select list > type name in **New Symbol List** name box.

c. Click Add Selected List to Flex Monitor.

d. When the list appears under the **Flex Monitor List**, select it, and click **OK**.

Create a Symbol List

1. On the Flex Monitor toolbar, click ☰ > **Add New**.
2. Type a name and optional description for the new symbol list.
3. To set the number of symbols per column, select the **Wrap Symbols** check box, and type or select your preferred settings.
4. To have Flex Monitor add and remove columns as needed when you add and remove symbols, select the option button **Add/Remove Columns Dynamically**.
5. To set the number of column sections for the list, select the option button **Set Number of Columns to**, and type the number of column sections > **OK**.
6. To populate the list, click the tab with the list name, and type symbols in the list.
   Tip: To create a symbol list based on another existing symbol list, right-click the tab of the list to copy > **Save As**.

Read-Only Lists

If you did not create a list, or if the list is managed in a separate component, the list is read-only. Following are types of lists that you cannot edit in Flex Monitor:

- @ Global Indexes list based on a specific index such as Dow@global
- Book of Business
- Default symbol lists that your administrator created
- Lists shared and created by another user

Read Write Lists

You can edit lists that you created in Flex Monitor. You can share the list with other users in the same company, but the other users open the list as read-only.

Share A list that you created with another user in your company

1. On the Flex Monitor toolbar, click ☰.
2. To find a list that is not currently appearing in Flex Monitor, click **Search For Additional Lists**, type or select search criteria and click **Go.**
3. Select a list, and click **Add Selected Lists to Flex Monitor**.
4. To lock the list to ensure the group and symbol positions persist, select the Lockdown checkbox.
5. To share a list, select a list in your Flex Monitor List, and click **Share this List** > **Apply** > **OK**.
6. To unshare the list, select the **Stop Sharing this List** > **Apply** > **OK**.

View Your Book of Business in Flex Monitor

Book of Business provides an overview of all your holdings and that of your clients. If you are a BETA client, you can see your entire Book of Business as a read-only list in Flex Monitor.

To view your Book of Business in Flex Monitor

- On the Flex Monitor toolbar, click 🖫.

  Your holdings are listed in a separate tab in Flex Monitor as Book of Business (RO). You can view its symbols in other components, such as News, as you can with any other symbol list in Flex Monitor.

Layouts

You can see the data that you want for the symbols in your lists with a layout. Refinitiv has created a range of layouts for the convenience of specific job requirements, for example, Market Overview. You can edit any of these layouts or create your own to accommodate additional requirements.

Create, delete or change
Flex Monitor Layouts.
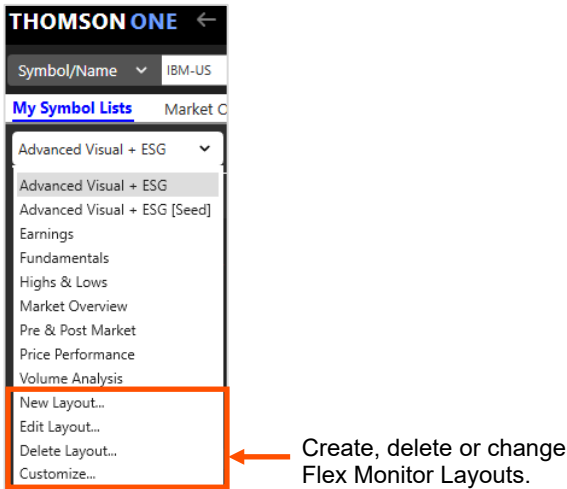
After you create or find a symbol list, you can select the data or graphical representations that you want to see.

Create a Layout

1. From the **Layout** drop-down list on the Flex Monitor toolbar, select **New Layout**.
2. To view a list of all available fields, select **All**.
3. In the **Available Data Fields** box, click a field that you want to use as a column header, and then click **Add**.

   Repeat for each field that you want to add.

4. To remove a column header, select it from the **Displayed Column Headers** box, and click **Remove**.
5. To change the order of a column header, select it in the **Displayed Column Headers** box, and click **Move Up** or **Move Down**.
6. To change the alignment of a column header, select it in the **Displayed Column Headers** box, and select a new alignment from the **Alignment** drop-down list.
7. Type a **Layout Name**.
8. Click **OK**.

Insert or Delete a Column

1. Right-click the column header next to where you want the new column.
2. Click **Insert Column**.
3. A column drop-down list appears to the left of the column you clicked. Click the arrow at the top of the **[New]** column, and select the new column header from the list.
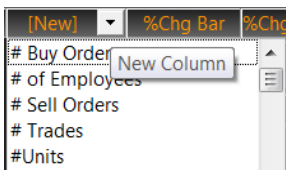
4. To remove a column, right-click the column header, and click **Delete Column**.

   The column disappears, and the layout in the layout drop-down list changes to reflect the deletion.

Collapse a Column

1. To configure a group of columns to show/hide with one click, right-click any column > **Layout > Edit**
2. In the **Displayed Column Headers** box, select the column or group of columns that you would like to collapse, and select the **Collapsible** box.

Collapsible columns are marked with **>**

Select to be able to collapse columns
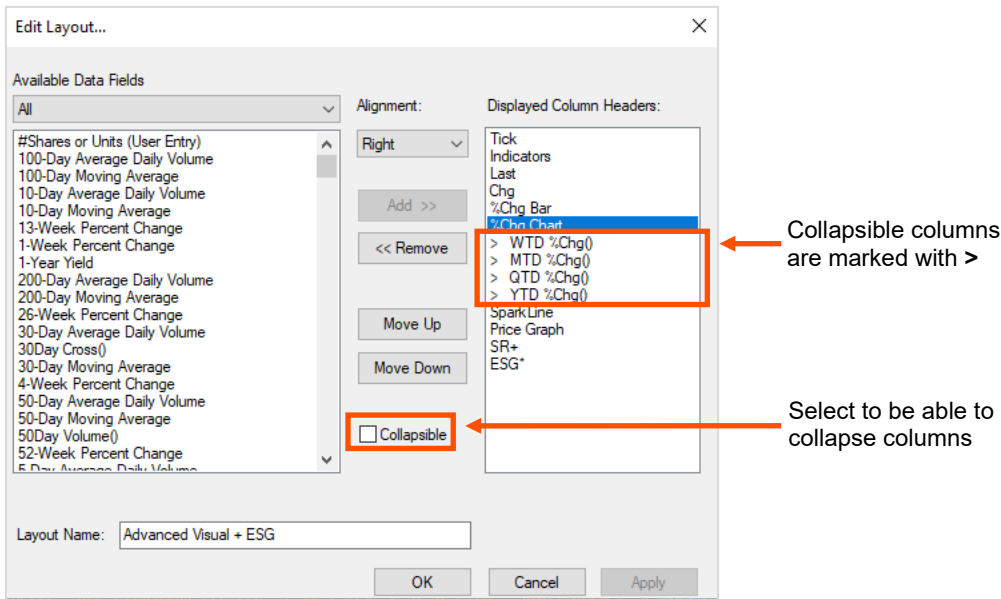
3. To collapse or show the columns that you have configured, click the arrow next to the column.

Click to display or collapse columns in Flex Monitor

Learn about Fields Available in Flex Monitor

1. To see a definition of available fields, when you are in Flex Monitor, press F1 to open the help.
2. Under **Related Topics**, click **Use Layouts to Specify the Data Items to Display**.
3. Under **Related Topics**, click **Fields in Flex Monitor and Flex Quote.**
4. Click a field name to see its definition.

Track Performance of your Portfolio and its Constituents

Track the Performance of List Constituents

You can add fields to Flex Monitor for a visual representation of the performance of each constituent in your portfolio :

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 view Percent **Change Chart** in Flex Monitor, point to each bar to see the time period. − To make the chart pop up when you point to it, right-click in the display **Properties** > **Other** tab > **General** > **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** > **Other** > **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.
Price Graph: VWAP, Last, Hi, Lo (Previous Close if in range)		The 1-10 rating is based on quantitative assessments of key trends on earnings, fundamentals, relative valuation, risk, price momentum, and insider trading. − To view **Price Graph**, point to the different parts of the line or the icons on it to see the daily high/low, last trade price, VWAP, and previous close (if the close is within the daily range).
ESG Scores		Environmental, Social, and corporate Governance (ESG) scores can help you evaluate investments. − To view overall and ESG pillar scores for the past three years, point to the score.
Stock Reports Plus Score		− To open the **Stock Reports Plus** overview by clicking a score in Flex Monitor, you need to create a drill down to the Stock Reports Plus service (entitlements required).

See a Company Summary for an Equity Symbol in Your Symbol list

1. In Flex Monitor, right click a symbol, and click **Company Summary**.

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

2. To see a summary of both the company and the symbol list contains it, right-click a symbol, and click **Company and Portfolio Summary.**

Create and View an Alert on a Symbol

Create and view Price & Volume alerts from Flex Monitor. When you set an alert, the alert is for the symbol in only that symbol list. If the same symbol is in another symbol list, the alert does not carry over to the other symbol list.

1. In Flex Monitor, right-click a value in the field that you want to monitor for this symbol, and click **Set Alerts**.
2. Type or select criteria.
3. To apply additional criteria or change the field, click **Switch to Advanced Mode**, and click **Save**.
4. In Flex Monitor, if you have the **Halt Indicator** column in your layout, a bell appears to indicate that you have set an alert on that symbol.
5. For further information on Alerts, refer to the Alerts Component Guide.

Track the Performance of your Portfolio

You can track the performance of a symbol list with the following Flex Monitor features:

Feature	What it does	How to see
Heat Map Mode	Lets you take the temperature of a symbol list	Click on the Flex Monitor toolbar.
Trader Portfolio View	Tracks the performance of your holdings on an individual and aggregate level	Click on the Flex Monitor toolbar.
Portfolio Summary	Graphically displays a sector performance overview and top and bottom movers per sector	Right-click, and click **Portfolio Summary**.
Portfolio Allocation View	Lets you reallocate or modify holdings of a portfolio, including one that that you created in Trader Portfolio View	Click on the Flex Monitor toolbar.

View a Symbol List as a Heat Map

1. To view a tiled heat map for all the symbols in your list and any symbol list groups or industry classifications, click on the Flex Monitor toolbar.
2. To view a heat map for a single group in your symbol list, click the group header bar in heat map mode. To return to the full list heat map view, click the group header bar again.
3. To view extended symbol details in the heat map itself, on the right side of the heat map, click **Zoom On Hover**.
4. To see the performance over different time periods, select a pre-set period under **Basis**.
5. To exit Heat Map mode and return to your symbol list, click .

Display the Ten Best and Worst Performers

1. On the Flex Monitor toolbar, click .
2. From the **Basis** drop-down list, select a sort basis.
3. Click **Winners/Losers**.
4. To return to the original heat map display, click **Winners/Losers** again.

In split mode you can view the Winners/Losers in the Heat Map view for an instant overview on best/worst performing segments.

Display Both a Symbol List and Heat Map (Split Mode)

1. On the Flex Monitor toolbar, click .

2. To return to your symbol list, click ▣ again.

Trader Portfolio View

You can add number of units/shares, purchase price, purchase date, and comments for a list in Flex Monitor or an imported list from the Trader Portfolio component. You can also paste symbols, units/shares, purchase price, purchase date, and comments from an Excel spreadsheet into Flex Monitor Standard view and view the information in Trader Portfolio view.

For more information, go to Flex Monitor, and press F1 for help.

Track Holdings in Trader Portfolio View

1. Click ⓉⓅ on the Flex Monitor toolbar to open **Trader Portfolio** view.
2. Type **Units/Shares**, **Purchase Price**, and optionally **Purchase Date** and/or **Comments** into the appropriate columns.

Symbol			Last	Chg	#Units	✎	Purchase Price	✎	Purchase Date		Comments	✎
−	Total											
AMZN	↓	N	146.15	+1.31	1711.508181		146.07		12/05/23		HOLD-Target Price $150	

3. From the **Cost Basis** drop-down list, select whether to view your gains/losses based on yesterday's close or your purchase price.

Classification: No Classification	⌄	Custom Data	⌄	USD	⌄	◯
Gainers: 0 Losers: 0 Gain/Loss:	Cost Basis:	Purchase Price	⌄	⊞		
		Purchase Price				
%Chg (... ▶	SparkLine	Price Graph	Yesterday's Close	Purchase... ✎	Pu	

See a Portfolio Summary

• In Flex Monitor, right click, and click **Portfolio Summary**.

Portfolio Summary opens, providing a sector performance overview and Top and Bottom Movers relevant to each sector for the symbol list that you are viewing is available.

Reallocate the Holdings in a Portfolio

In Portfolio Allocation view, you can change the total amount invested in a portfolio, add or delete specific holdings, and reallocate the percentage of each holding.

1. When you are viewing the portfolio (symbol list) that you want to edit, click ▦ on the Flex Monitor toolbar to open **Portfolio Allocation** view.
2. To add holdings

    a. In the symbol column, type a symbol that you want to add.

    b. To add another symbol, press Enter, and type the next symbol.

    c. Continue until you have completed your additions.

    d. In the **Allocation %** column, type a percentage for each new symbol.

    A highlight appears for the new percentages, warning that the allocations have exceeded 100%.

Sym L Chg	⌄	View	≡	¹₂³	💰	ⓉⓅ	▦	📖	➡	▤	☰	⟳	📄
Trader Portfolio Allocation: Client X Portfolio			Amount to Allocate:		1,000,000			Adjust #Units	⌄	Reallocate	◯		

Allocated: 1,050,000.00   105% Remaining: -50,000.00   -5%

Symbol	✎		Last	Chg	Allocatic...	✎	Total Cost	✎	Purchase Price	✎	#Units	✎	Comments	✎	Purchase Date	✎
− Collapse All																
AMZN	↑	N	146.13	+1.29	25.00		250000.00		146.07		1711.508181				12/05/23	
GE	↑	N	120.80	-0.73	15.00		150000.00		120.73		1242.441812				12/05/23	
IBM	↑	N R	162.09	+0.99	15.00		150000.00		161.92		926.383399				12/05/23	
AAPL	↓	N R	193.59	+4.16	25.00		250000.00		193.32		1293.192634				12/05/23	
MSFT	↑	N R	371.66	+2.52	25.00		250000.00		371.19		673.509523				12/05/23	

Total allocation exceeds 100%

    e.   Type new allocations for the previously added symbols until the highlights disappear.

3. To remove holdings

    a.   Click the symbol that you want to remove, and press Delete.

    b.   Continue until you have completed your removals.

       Above the symbol list, the remaining percentage appears.

    c.   Type new allocation percentages to adjust the remaining holdings until they equal 100%.

4. To change the size of the portfolio and change the allocations for its holdings

    a.   Above the symbol list, type the new **Amount to Allocate**.

    b.   From the drop-down list, select whether to adjust **# Units** or **Allocation %**.

    c.   Click **Reallocate**.

    d.   If your reallocation exceeds the amount of money invested in your portfolio, the amount exceeded is highlighted.

       Type new allocation% for any holdings so that they meet the amount allocated to the portfolio.

See the Values of Peers of a Symbol

Peers Monitor ascribes peers to a company according to criteria that you choose. Peers Monitor displays the symbol with its top 10 matches according to the chosen criteria.

To view the values of a symbol's peers

1. In Flex Monitor, click a symbol.

2. On the Flex Monitor toolbar, click .

3. Select a layout, Market, and/or financial criteria, such as Market Capitalization.

4. Click **Go**.

    When finished, click the **X** to close the Peers Monitor window.

Use your Symbol Lists throughout Thomson ONE

You can access your most recently viewed symbol list in other components for a deeper look at the market situation.

The most recently viewed symbol list is below the group tabs in most workspaces.
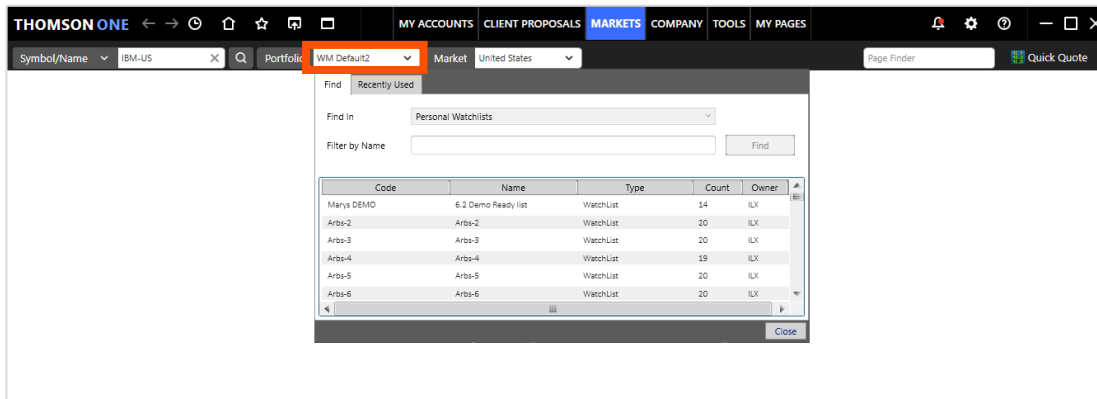
In these components, content is based on the symbols in the most recently viewed symbol list/portfolio:

- Research Portfolio List View
- News

See a Symbol List in News

- On the main page of Thomson ONE, drag a Flex Monitor tab into News.

  The headlines that appear are on the symbols from the symbol list.

Flex Monitor: Change how the Display Looks and Behaves

To make most changes to the appearance of the display, right-click > **Properties** or click ⚙. For more information and a complete list of properties, press F1 to access help. When the seed administrator changes the properties, they take effect the first time that users log in. Then users can reset the Properties on their Flex Monitor to accommodate different preferences or requirements.
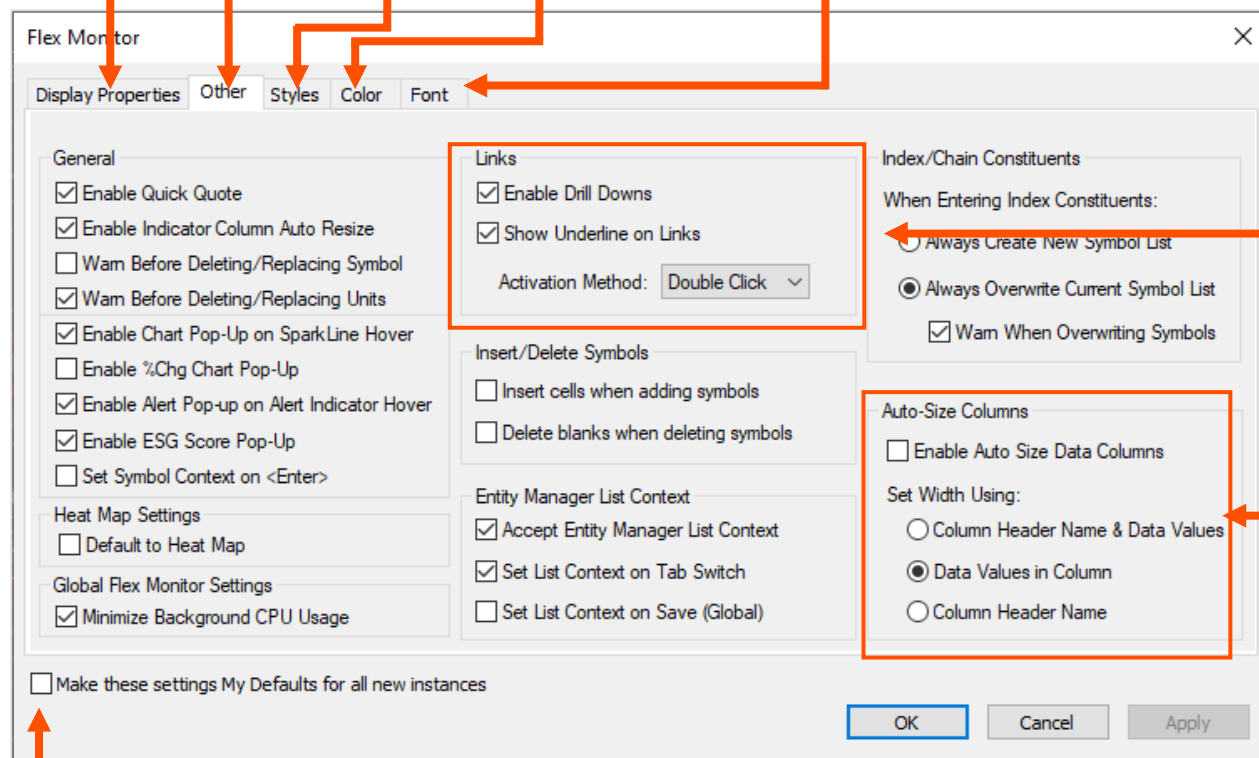
Set display properties, including toolbar, tab, scrollbar, and trade blink settings

Set behavior properties

Set styles for headings, tabs, and

Change various colors, including symbol, column, alert, background colors

Change font or size of symbols or column headings

Enable drill downs and configure activation and differentiation methods

To auto-size a column, point to the right edge of the column and double-click
This makes the column exactly as wide as either the column header or the widest item in the column, depending on this setting

Retain the Properties of your initial instance when you set up a new instance of Flex Monitor

Flex Monitor

Display Properties | Other | Styles | Color | Font

General
- ☑ Enable Quick Quote
- ☑ Enable Indicator Column Auto Resize
- ☐ Warn Before Deleting/Replacing Symbol
- ☑ Warn Before Deleting/Replacing Units
- ☑ Enable Chart Pop-Up on SparkLine Hover
- ☐ Enable %Chg Chart Pop-Up
- ☑ Enable Alert Pop-up on Alert Indicator Hover
- ☑ Enable ESG Score Pop-Up
- ☐ Set Symbol Context on <Enter>

Heat Map Settings
- ☐ Default to Heat Map

Global Flex Monitor Settings
- ☑ Minimize Background CPU Usage

Links
- ☑ Enable Drill Downs
- ☑ Show Underline on Links

  Activation Method: Double Click ▾

Insert/Delete Symbols
- ☐ Insert cells when adding symbols
- ☐ Delete blanks when deleting symbols

Entity Manager List Context
- ☑ Accept Entity Manager List Context
- ☑ Set List Context on Tab Switch
- ☐ Set List Context on Save (Global)

Index/Chain Constituents

When Entering Index Constituents:
- ○ Always Create New Symbol List
- ● Always Overwrite Current Symbol List
  - ☑ Warn When Overwriting Symbols

Auto-Size Columns
- ☐ Enable Auto Size Data Columns

Set Width Using:
- ○ Column Header Name & Data Values
- ● Data Values in Column
- ○ Column Header Name

☐ Make these settings My Defaults for all new instances

OK | Cancel | Apply

Learn More

Learn More

LSEG Academy

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

Contact Us

+1 (888) 463 3383

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

Click here to:
- Get support
- Track support tickets

London Stock Exchange Group, is one of the world's largest providers of financial markets data and infrastructure. With $6.25 billion in revenue, over 40,000 customers and 400,000 end users across 190 countries, LSEG is powering participants across the global financial marketplace. We provide information, insights, and technology that enable customers to execute critical investing, trading and risk decisions with confidence. By combining a unique open platform with best-in-class data and expertise, we connect people to choice and opportunity – driving performance, innovation and growth for our customers and partners.

LSEG DATA & ANALYTICS