

# **Quotestream**

## **Active Sheets**

### [Installing Quotestream Active Sheets](#)

[Microsoft Excel for Windows](#)

[Microsoft Excel for Mac](#)

[Microsoft Excel on Web](#)

[Start using your Office add-in with Excel](#)

### [How to use Quotestream Active Sheets?](#)

[Menu buttons](#)

[Streaming Formula Builder](#)

[Historical Formula Builder](#)

[Refresh tool](#)

[Templates](#)

[Creating a streaming data function \(QMS\)](#)

[Data points as functions](#)

[Creating a historical data function \(QMH\)](#)

### [RTD Converter Tool](#)

[Data Points Coverage - QMS formula \(streaming\)](#)

[Data Points Coverage - QMH formula \(historical\)](#)

[System Requirements](#)

[Frequently Asked Questions \(FAQ\)](#)

[Support](#)

[Version Information](#)

Quotestream Active Sheets is a powerful tool that enhances your control over market data. Whether you prefer to view streaming market data in a spreadsheet or perform specialized calculations and use specific Excel features such as charting, data aggregation, conditional formatting, and macros, this tool is designed to meet your needs.

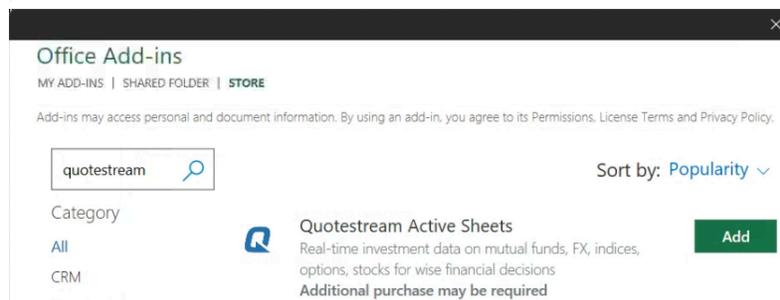
With Quotestream Active Sheets, you can track over 250 market statistics, ranging from basic quote data (last price, volume, change, bid, and ask) to more complex data points, including financials, key ratios, and historical prices. Data for up to 500 symbols is supported.

# Installing Quotestream Active Sheets

Installing Quotestream Active Sheets into your Excel worksheet is a breeze. It's supported by Microsoft Excel 365, Excel 2021, and above. You can do it in just a few clicks. To install Quotestream Active Sheets, follow the instructions below.

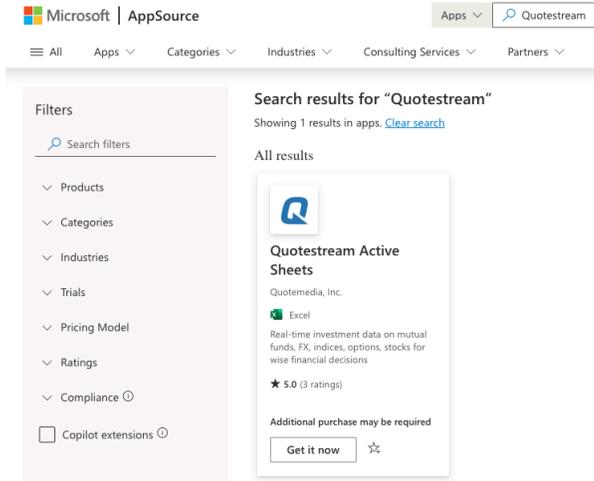
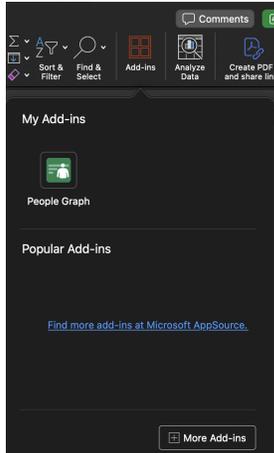
## Microsoft Excel for Windows

1. Click **File > Get Add-ins**
2. In the **Office Add-ins**, go to **Store**
3. Browse for Quotestream Active Sheets then
4. Click **Add** to install the add-in



## Microsoft Excel for Mac

1. Click **Home > Add-ins**
2. By clicking on **Find more add-ins at Microsoft AppSource** you will be redirected to the Microsoft Store page where you can
3. **Browse** for Quotestream Active Sheets, then
4. Click **Get It Now** to install the add-in

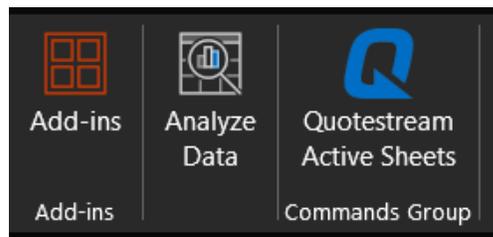


## Microsoft Excel on Web

1. Click **Home > Add-ins**
2. **Browse** for Quotestream Active Sheets, then
3. Click **Add** to install the add-in

## Start using your Office add-in with Excel

1. **Select** Quotestream Active Sheets from the add-ins list
2. Just click on the corresponding icon, and the Quotestream Active Sheets sidebar will appear

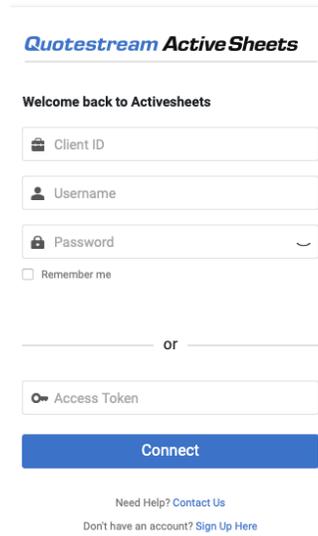


Please note that Quotestream Active Sheets is a premium service, and a subscription is required to access all its features. You can also sign up online if you are not a user.

# How to use Quotestream Active Sheets?

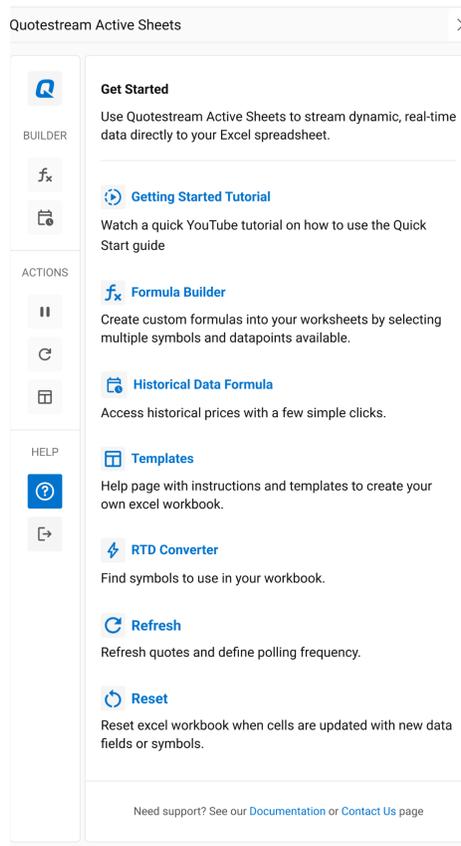
Using Quotestream Active Sheets is easy. After installing the Quotestream Active Sheet add-in in your Microsoft Excel, you need to log in by entering your credentials (Client ID/W MID, Username, and Password).

Alternatively, you can access the add-in through an access token provided by other applications.



The login form for Quotestream Active Sheets. It features the title "Quotestream Active Sheets" at the top. Below it is a "Welcome back to Activesheets" message. The form contains three input fields: "Client ID" with a key icon, "Username" with a person icon, and "Password" with a lock icon and a toggle for visibility. There is a "Remember me" checkbox below the password field. A horizontal line with "or" in the center separates the credential fields from the "Access Token" field, which has a key icon. A blue "Connect" button is positioned below the "Access Token" field. At the bottom, there are two links: "Need Help? Contact Us" and "Don't have an account? Sign Up Here".

After logging into Quotestream Active Sheets, the app menu will be displayed.



The app menu for Quotestream Active Sheets, displayed in a window titled "Quotestream Active Sheets". The menu is organized into four sections: "BUILDER", "ACTIONS", "HELP", and "RTD Converter".

- Get Started**: Use Quotestream Active Sheets to stream dynamic, real-time data directly to your Excel spreadsheet.
  - [Getting Started Tutorial](#): Watch a quick YouTube tutorial on how to use the Quick Start guide.
- Formula Builder**: Create custom formulas into your worksheets by selecting multiple symbols and datapoints available.
- Historical Data Formula**: Access historical prices with a few simple clicks.
- Templates**: Help page with instructions and templates to create your own excel workbook.
- RTD Converter**: Find symbols to use in your workbook.
- Refresh**: Refresh quotes and define polling frequency.
- Reset**: Reset excel workbook when cells are updated with new data fields or symbols.

Need support? See our [Documentation](#) or [Contact Us](#) page

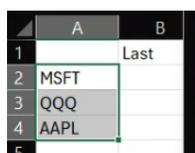
## Menu buttons

1. **Streaming Formula Builder** - This feature helps you quickly create real-time formulas in your worksheets by selecting single or multiple symbols and data points available
2. **Historical Formula Builder** - This feature allows you to retrieve historical data from a symbol
3. **Play/Pause** - Stop the data update at any time by clicking this button
4. **Refresh** - Refresh the current workbook quotes, select update type (streaming or snapshot), and reset the add-in connection
5. **Templates** - Some templates are available to facilitate the creation of your custom spreadsheets
6. **Help** - Contains all the details to help you use Quotestream Active Sheets
7. **Logout** - Button to safely log out of the add-in

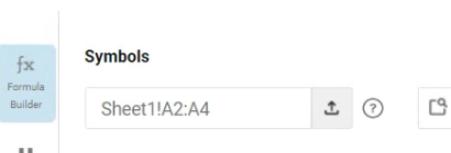
## Streaming Formula Builder

Streaming Formula Builder is our quick builder tool to help you create real-time formulas. In this tool, you can search for symbols and data points, select to display a header along with its orientation, and specify where in your workbook the data should be displayed.

To begin, click on the **symbol** input box and look for the symbols you want to include in the formula. You can also click on the  icon to refer to the cells that contain the symbols. First, select the cells with the given values and click the corresponding button.

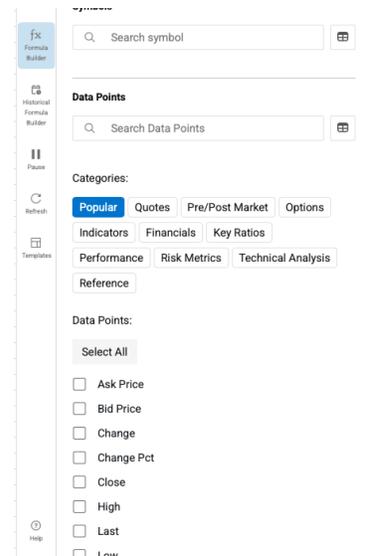


	A	B
1		Last
2	MSFT	
3	QQQ	
4	AAPL	



Symbols

Sheet1!A2:A4



Data Points

Search Data Points

Categories:

Popular Quotes Pre/Post Market Options

Indicators Financials Key Ratios

Performance Risk Metrics Technical Analysis

Reference

Data Points:

Select All

Ask Price

Bid Price

Change

Change Pct

Close

High

Last

Low

After that, select the **data points** for the formula. You can do this in three different ways: simply typing them in the input box (for example, Last), searching through the lists by categories, or even referencing the cells in the same way as explained above with symbol lookup.

Using lists by category, it is possible to quickly add all the data points from a category, making it easier to create the formula.

**Additional parameters** can be configured, including the header display, layout type, and the location where the results will be displayed in the spreadsheet.

**More Options** ^

Header:

Show Header

Header Placement:

Symbols in rows ▾

Data Placement:

New Worksheet

Existing Worksheet

Reference:

Sheet1!\$A\$1|

The spreadsheet's **header** consists of symbols and data point labels. Selecting the “show header” options with the symbols in rows will make them available, one below the other, and the data points in the columns. The opposite occurs when you choose to present symbols in columns.

	A	B	C	D
1		Last	High	Low
2	AAPL	209.81	209.99	201.07
3	MSFT	404.29	405.67	398.5
4	JPM	202.345	202.36	194

Symbols in rows

10		AAPL	MSFT	JPM
11				
12	Last	209.7428	209.99	201.07
13	High	404.36	405.67	398.5
14	Low	202.34	202.395	194

Symbols in columns

In the **data placement** option, you can select where to display the results in the existing worksheet or a new one in the same workbook (file).

## Historical Formula Builder

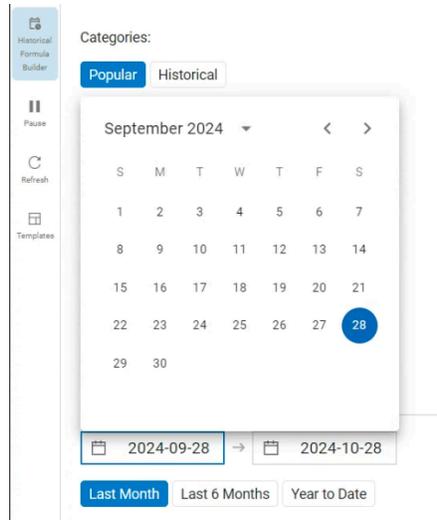
The Historical Data Formula Builder allows you to create a formula to retrieve daily historical prices. This feature is similar to the streaming formula builder; however, you must also select a date range and add additional parameters such as data type and the order in which you want to view the results table.

The screenshot shows the 'Historical Formula Builder' interface. On the left is a sidebar with 'Actions' (PAUSE, REFRESH, TEMPLATES). The main area is titled 'Data Points' and includes a search bar with 'Last', 'Open', 'Low', and 'High' selected. Below are 'Categories' (Popular, Quotes, Pre/Post Market, Options, Indicators, Key Ratios, Performance, Risk Metrics, Technical Analysis, Reference) and 'Data Points Categories' (Last, Percent Change, High, Low, Change Pct., Accumulated Trade Value, Accumulated Volume). A 'Historical Date Range' section has date pickers and pre-selected periods: 'Last Month', 'Last 6 Months', and 'Year to Date'. A 'More Options' link is at the bottom right.

To begin, click on the **symbol** input box and search for the symbol you want to include in the formula. You can also click on the  icon to refer to the cell or range that contains the symbols by first selecting the cells with the given values and then clicking the corresponding button.

After that, select the **data points** for the formula. You can do this in three different ways: simply typing them in the input box (for example, Close), searching through the lists by categories, or even referencing the cells in the same way as explained above with symbol lookup.

Select a date range using the date picker or by clicking on one of the pre-selected periods in the list.



Just like with symbols and data points, you can reference cells in the spreadsheet for start and end dates. This is very useful when combined with Excel's native formulas, =TODAY() and =EDATE.

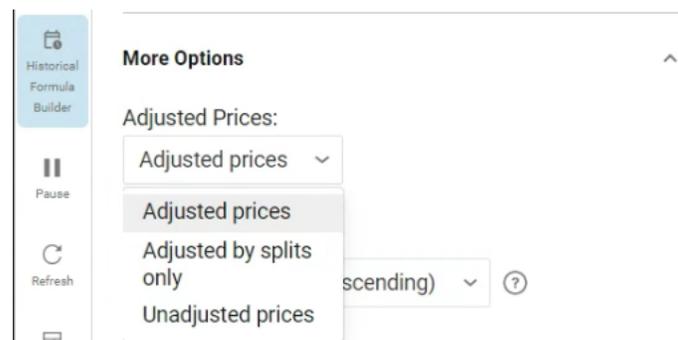
To configure **additional parameters**, just click on More Options to expand the menu.

In the **Adjusted Prices** option, you can define whether you want to view the results with adjusted prices, adjusted by splits only, and unadjusted prices.

**Trading Days** defines whether the table will be populated with all dates or only those with trading activity (excluding zero values). Choose only trading days, weekdays (including holidays), or all calendar days.

**The Fill** parameter works in conjunction with the additional parameter Trading Days and helps determine the action to be taken in the event of data gaps. That could be: previous day (carry over the previous day's data), next day (fill with next day's data), or blank (leave cells blank in case the volume is zero).

Using the **Sorting Order** selection, you can configure the order of the results by date, choosing between newest to oldest or oldest to newest.

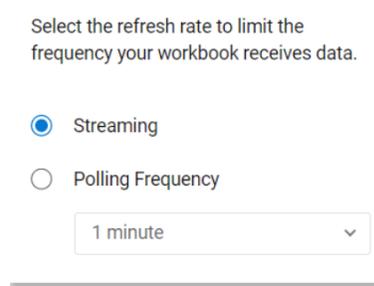


In the same way as explained in the streaming formula builder, the spreadsheet's **header** consists of symbols and data point labels. Selecting the “show header” options with the symbols in rows will make them available, one below the other, and the data points in the columns. The opposite occurs when you choose to present symbols in columns.

In the **data placement** option, you can select where to display the results: either in the existing worksheet or in a new one within the same workbook (file).

## Refresh tool

You can switch the price **update frequency** on this page between streaming and snapshot data (polling). You can select one of the predefined intervals for snapshot updates or customize it to be as short as 1 second. Note that custom polling frequency inputs are made in seconds.



Select the refresh rate to limit the frequency your workbook receives data.

Streaming

Polling Frequency

1 minute

The screenshot shows a settings panel for the refresh rate. It has a title "Select the refresh rate to limit the frequency your workbook receives data." Below the title are two radio button options: "Streaming" (which is selected) and "Polling Frequency". Below these options is a dropdown menu currently showing "1 minute".

If the add-in is in Pause mode and you want a punctual price update, use the **Refresh Quote button** at the top. This button is designed to update the data at your command.

On the other hand, the **Reset Connection button** at the bottom of the Refresh feature restarts the add-in in case you encounter any communication issues.

## Templates

This page contains our pre-built templates, which enable you to quickly customize your spreadsheets and access a wide range of real-time data updated with Active Sheets.

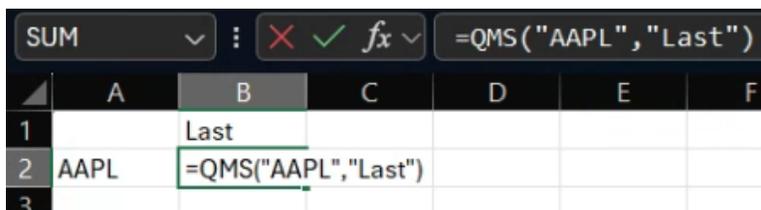
You can use them the way you need, linking them to other Excel files and adding other Excel functions.

## Creating a streaming data function (QMS)

In addition to the formula builder, you can create the **QMS function** to retrieve streaming data directly in the spreadsheet. The QMS formula consists of two arguments: symbols and data points.

**=QMS(Symbol, Data Point)**

You must **type** the desired symbol and data point between double quotes (“ ”). Example: =QMS(“AAPL”, “Last”).



Quotestream Active Sheets supports more than 200 data points, including technical and fundamental analysis data.

Data point names are intuitive, especially for use with the formula builder. Quotestream Active Sheets also accepts **short names** for data points to speed up the formula creation process. You can type “Return on Equity” or simply “ROE” when creating the function.

Some other examples are:

Long Data Point Name	Short Data Point Name	Function Example
Performance 1 Year Pct	Chg1yPct	=QMS(“MSFT”, “Chg1yPct”)
Ask Price	Ask	=QMS(“MSFT”, “ask”)
Price Earnings Ratio	PERatio	=QMS(“MSFT”, “peratio”)

The complete list of available data points is in the [specific section](#).

You can also **reference the cells** containing the given symbol and data point, as in the example below. In this case, it is also possible to use absolute references from Excel (B\$1 or \$A2, for example) and simply drag the formula to apply to other cells with data.

	A	B	C	D	E
1		Last			
2	AAPL	=QMS(A2,B1)			
3	MSFT				
4	JPM				

Still using cell references, it is possible to combine a selection of **multiple** symbols and data points in a single formula. The results will be displayed as a formula array, so the symbol and data point labels must be organized in a single row or column.

	A	B	C	D	E	F
1		Last	High	Low		
2	AAPL	A4,B1:D1)	209.99	201.07		
3	MSFT	399.61	405.67	398.5		
4	JPM	200.34	202.6	194		

The array of formulas may not work correctly if the data input is spread across multiple rows and columns in the spreadsheet. It must always be symbols in rows (in a single column) and data points in columns (in a single row) or vice versa.

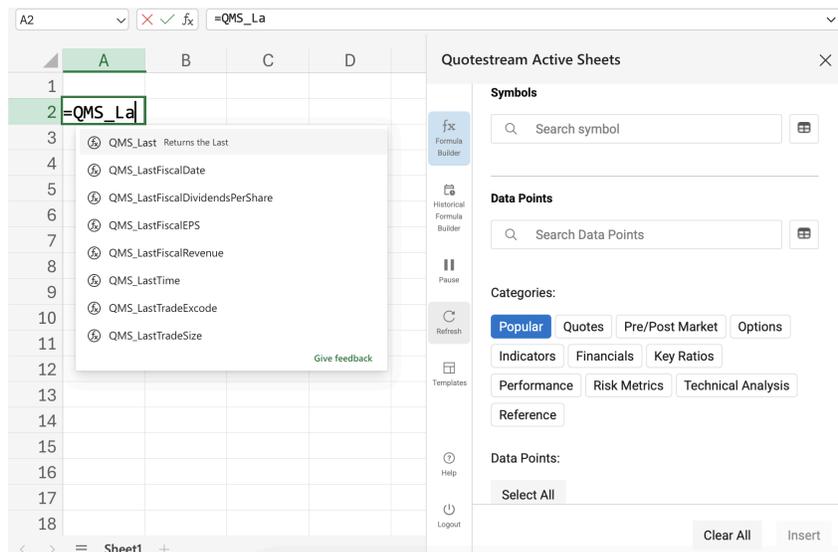
	A	B	C	D	E
1				Last	
2	AAPL	QQQ		Open	
3	MSFT	JPM		High	
4		C		Low	
5					
6					
7					
8	B4,D1:D4)	205.3	209.99	201.07	
9	439.53	437.23	447.07	434.56	
10	399.61	400	405.67	398.5	
11	200.34	195.4	202.6	194	
12	Invalid sym	Invalid sym	Invalid sym	Invalid symbol:	
13	56.56	56.39	57.655	56.09	

## Data points as functions

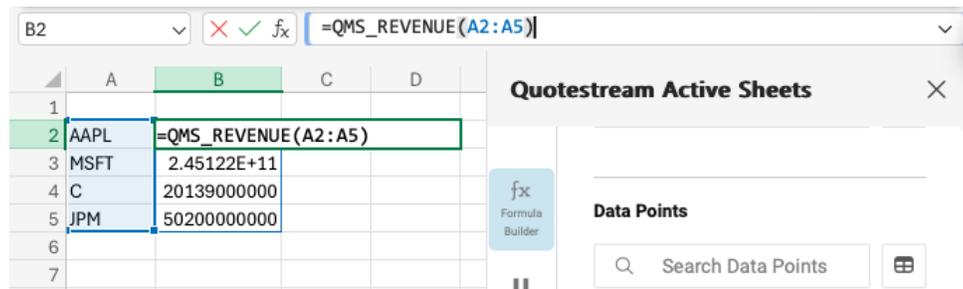
Quotestream Active Sheets offers an alternative formula structure for retrieving data in real-time. Instead of using the function =QMS(Symbol, Data Point), you can also call the structure

**=QMS\_Data Point (Symbol)**. Example: =QMS\_Last("MSFT")

This may be useful if you want to create a formula more quickly in the spreadsheet for a specific data point you are looking for. The data point options appear as you start typing the function in a cell.



These functions can also be applied to multiple symbols.



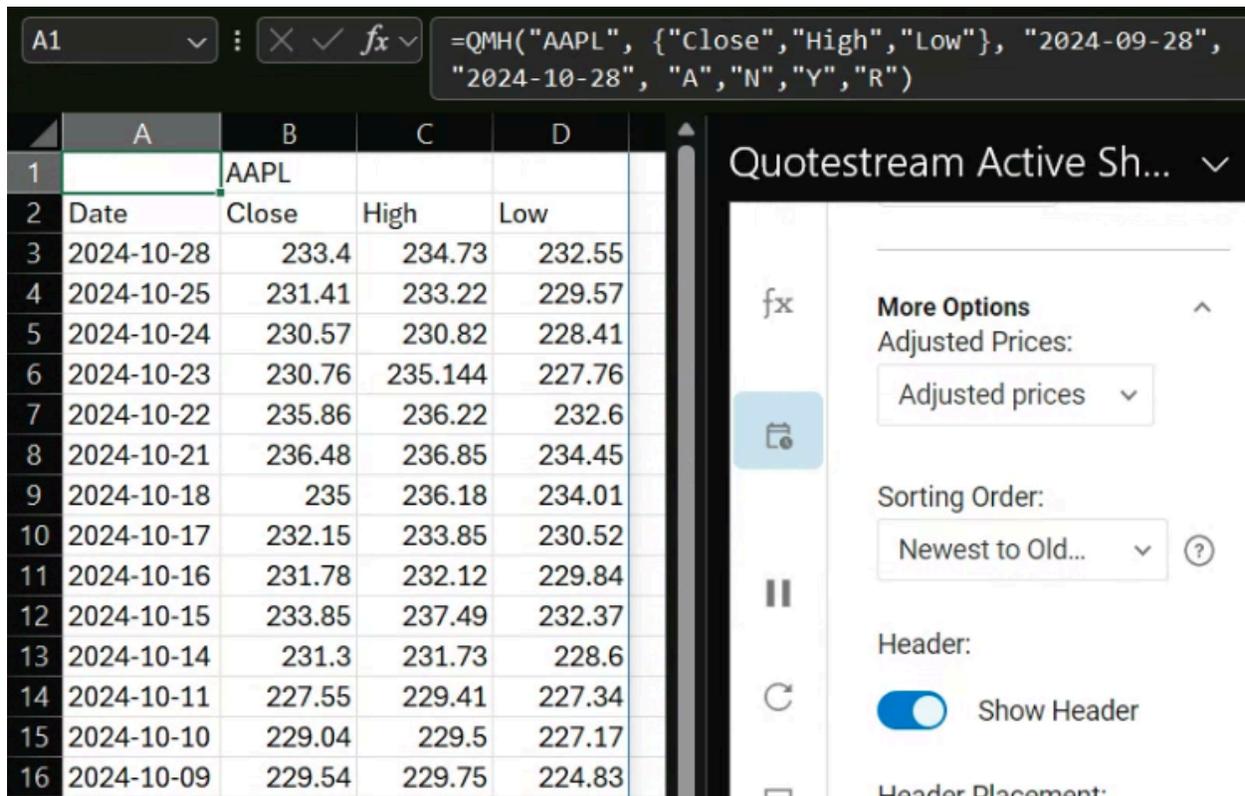
The complete list of available data points is in the [specific section](#).

## Creating a historical data function (QMH)

If you already know the symbol and data points for which you want to create the historical data function, you can directly type the formula into the spreadsheet. The QMH formula consists of the following arguments: symbol, data points, start date, end date, and optional parameters.

**=QMH (Symbol, Data Point, Start, End, Opt. Parameter1, Opt. Parameter 2,...).**

Remember that all inputs (symbol, data points, start date, etc.) must be in double quotes (" "). Example: =QMH("AAPL", "Close", "2024-04-01", "2024-05-01", "U").



The screenshot shows a spreadsheet with a formula bar at the top containing the QMH function: `=QMH("AAPL", {"Close","High","Low"}, "2024-09-28", "2024-10-28", "A","N","Y","R")`. The spreadsheet data is as follows:

	A	B	C	D
1		AAPL		
2	Date	Close	High	Low
3	2024-10-28	233.4	234.73	232.55
4	2024-10-25	231.41	233.22	229.57
5	2024-10-24	230.57	230.82	228.41
6	2024-10-23	230.76	235.144	227.76
7	2024-10-22	235.86	236.22	232.6
8	2024-10-21	236.48	236.85	234.45
9	2024-10-18	235	236.18	234.01
10	2024-10-17	232.15	233.85	230.52
11	2024-10-16	231.78	232.12	229.84
12	2024-10-15	233.85	237.49	232.37
13	2024-10-14	231.3	231.73	228.6
14	2024-10-11	227.55	229.41	227.34
15	2024-10-10	229.04	229.5	227.17
16	2024-10-09	229.54	229.75	224.83

On the right side, a 'Quotestream Active Sh...' panel is visible with the following settings:

- fx icon
- More Options (expanded)
- Adjusted Prices: Adjusted prices (dropdown)
- Sorting Order: Newest to Old... (dropdown)
- Header: Show Header (toggle, currently on)
- Header Placement: (dropdown)

If you want to add more than two data points in the formula, just include { } between them (example: {"Close","High","Low"}).

Start and End dates should be in the YYYY-MM-DD format.

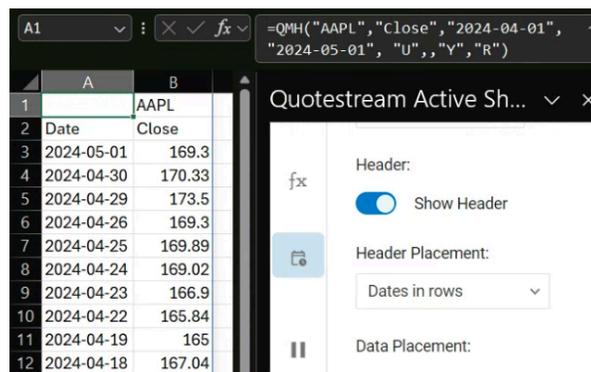
The **mandatory inputs** for the QMH function are: symbol, data point, start date, and end date. The formula will bring results if you create =QMH("AAPL","Close","2024-04-01","2024-05-01"). If none of the additional parameters are added, the QMH function respects the default values to return:

- Prices adjusted by corporate actions
- Sorting order from newest to oldest
- The header will be hidden
- Dates will be displayed in rows (one column)
- The table will bring results for when the volume is more than zero

If you want to configure any additional parameters, just follow the order of each of them in the function and use one of the acronyms from the reference table below.

Optional Parameter	Accepted values
Adjusted Prices	<b>A - Adjusted Prices</b> S - Adjusted by Splits Only U - Unadjusted
Sorting Order	<b>N - Newest to Oldest (Descending)</b> O - Oldest to Newest (Ascending)
Show Header	Y - Show header <b>N - Hide header</b>
Header Placement	<b>R - Dates in rows</b> C - Dates in columns
Trading Days	<b>T - Trading Days</b> W - Weekdays C - All Calendar Days
Filler value	<b>B - Blank</b> P - Previous day N - Next Day

If you leave any arguments blank, the add-in will use the one defined as the default. For example: =QMH("AAPL", "Close", "2024-04-01", "2024-05-01", "U", , "Y", , "W", "B")



Quotestream Active Sheets supports major historical price data points, including VWAP and open interest.

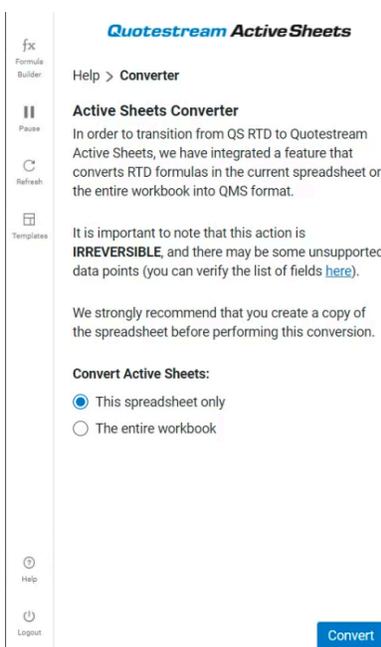
The complete list of available data points for the QMH function is in the [specific section](#).

# RTD Converter Tool

Recognizing the importance of this powerful product, we developed a feature in the add-in to assist current Quotestream RTD users in transitioning to Quotestream Active Sheets.

The RTD Converter tool, located under the Help page, converts legacy RTD formulas into QMS format. It can be applied to the current spreadsheet or the entire workbook.

It is essential to note that once converted, the formulas cannot be reverted from Active Sheets format (QMS) to legacy RTD. We strongly recommend creating a copy of the spreadsheet before performing this conversion.



The following RTD data points are currently **not supported** in Quotestream Active Sheets and will not be converted.

Average Volume 365 Day	Performance 3 Year Annualized	TRIV
Average Volume 90 Day	Performance 5 Year Annualized	YTD (value)
Dividend Current Payout Ratio	Performance 10 Year Annualized	Panel
Tick Volume	Short Interest Avg Daily Volume	Post
Tick		

# Data Points Coverage - QMS formula (streaming)

## 1. Quotes Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Accumulated Price	AccumPrice	Last Trade Time	LastTradeTime
Accumulated Trade Value	AccumValue	Low	Low
Accumulated Volume	AccumVol	Open	Open
Ask Price	Ask	Open Time	OpenTime
Ask Size	AskSize	Previous Close	PClose
Bid Price	Bid	Price	Price
Bid Size	BidSize	Quote Indication	Indication
Buy Transaction	BuyTxns	Sell Transaction	SellTxns
Buy Value	BuyValue	Sell Value	SellValue
Buy Volume	BuyVol	Sell Volume	SellVol
Change	Chg	Size	Size
Change Pct	ChgPct	Tick	Tick
Close	Close	Timestamp	Timestamp
High	High	Trade Count	TradeCount
Last	Last	Trade Value	TradeValue
Last Trade Excode	LastTradeExc	Volume	Volume
Last Trade Size	LastSize		

## 2. Pre/Post Market Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Post Market Change	PostChg	Pre Market Change	PreChg
Post Market Change Pct	PostChgPct	Pre Market Change Pct	PreChgPct
Post Market Last	PostLast	Pre Market Last	PreLast
Post Market Last Trade Time	PostTime	Pre Market Trade Time	PreTime
Post Market Volume	PostVolume	Pre Market Volume	PreVolume

### 3. Options Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Ask Implied Volatility	AskImpVol	Mark	Mark
Bid Implied Volatility	BidImpVol	Mark Change	MarkChg
Delta	Delta	Mark Change Pct	MarkChgPct
Extrinsic Value	Extrinsic	Open Interest	OpenInt
Gamma	Gamma	Previous Mark	PMark
Implied Volatility	ImpVol	Rho	Rho
Implied Volatility Change	ImpVolChg	Theta	Theta
Intrinsic Value	Intrinsic	Vega	Vega

### 4. Indicators Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Annual High	AnnualHigh	Market Maker Id	MktMakerId
Annual Low	AnnualLow	Near Indicative Closing Price	NearIndClose
Ask Condition	AskCondition	Paired Volume	PairedVol
Ask Excode	AskExCode	Periods	Periods
Ask Not Executable	AskNotEx	Price Variation	PriceVar
Bid Condition	BidCondition	Range Indicator	Range
Bid Excode	BidExCode	Regulation SHO	RegSho
Bid Not Executable	BidNotEx	Sell Block Transactions	SellBlockTxns
Buy Block Transactions	BuyBlockTxns	Sell Block Value	SellBlockValue
Buy Block Value	BuyBlockValue	Sell Block Volume	SellBlockVol
Buy Block Volume	BuyBlockVol	Short Interest	ShortInt
Far Indicative Closing Price	FarIndClose	Short Interest Change	ShortIntChg
Imbalance Reference Price	ImbRefPrice	Short Interest Change Pct	ShortIntChgPct
Imbalance Side	ImbSide	Short Interest Date	ShortIntDate
Imbalance Size	ImbSize	Short Interest Ratio	ShortIntRatio
Imbalance Type	ImbType	TWAP	TWAP
Indicator	Ind	Upper Limit	LimitU
Last Time	LastTime	VWAP	VWAP
Lower Limit	LimitL		

## 5. Financials Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
CAPEX Annual	CapexA	Long Term Debt Annual	LTDebtA
Cash Equivalents Annual	CashEqA	Net Income Annual	NetIncomeA
Cash Flow Financing Annual	CFFinA	Net PPE Annual	PPEY
Cash Flow Investing Annual	CFInvA	Non Current Accounts Rec Annual	NonCAccountA
Cash Flow Operations Annual	CFOpeA	Non Current Assets Annual	NonCAssetsA
Cost of Revenue Annual	CostA	Non Current Liabilities Annual	NonCLIabiA
Current Assets Annual	CAssetsA	Non Operating Expenses Annual	NonOpExpA
Current Debt Annual	CDebtA	Operating Expenses Annual	OpExpA
Current Liabilities Annual	CLiabilitiesA	Operating Income Annual	OpIncA
Depreciation Amortization Annual	DepAmoA	Other Current Assets Annual	OCurAssetsA
EBIT Annual	EBITY	Other Non Current Assets Annual	ONonCAssetsA
EBITDA Annual	EBITDAY	Payables and Accrued Exp Annual	PayablesA
Expenses Total Annual	ExpensesA	Pretax Income Annual	PTaxInca
Free Cash Flow Annual	FCFY	Receivables Annual	ReceivablesA

## 6. Key Ratios Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Asset Turnover	AssetTurnover	Price Earnings High 5y	PEHigh5y
Current Ratio	CurrentRatio	Price Earnings Low 5y	PELow5y
Debt To Equity Ratio	DERatio	Price Earnings Ratio	PERatio
Dividend	Div	Price to Book Ratio	PBRatio
Dividend Date	DivDate	Price to Cash Flow Ratio	PCFRatio
Dividend Growth 3y	Div3y	Price to Free Cash Flow Ratio	PCFCRatio
Dividend Growth 5y	Div5y	Price to Sales Ratio	PSRatio
Dividend Yield	DivYield	Price to Tangible Book Value Ratio	PTBVRatio
Earnings Per Share	EPS	Profit Margin Cont	ProfitMarginCont
Earnings Quarter End	EarningsQtr	Profit Margin Total	ProfitMarginTot
EBIT Margin	EBITMargin	Quick Ratio	QuickRatio
EBITDA Margin	EBITDAMargin	Receivables Turnover	RecTurnover
Employees	Employees	Return On Assets	ROA
Enterprise Value	EV	Return On Assets Ltm	ROALtm
Gross Margin	Margin	Return On Capital	ROC
Interest Coverage	IntCoverage	Return On Capital Ltm	ROCLtm
Invoice Turnover	InvTurnover	Return On Equity	ROE
Last Fiscal Date	LFDate	Return On Equity Ltm	ROELtm
Last Fiscal Dividends Per Share	DivPerShareLf	Return On Invested Capital 1yr	ROIC1y
Last Fiscal EPS	LFEps	Return On Invested Capital Qtr	ROICQtr
Last Fiscal Revenue	LFRevenue	Revenue	Revenue
Leverage Ratio	LeverageRatio	Revenue 3y	Revenue3y
Long Term Debt to Capital	LTDebtToCap	Revenue 5y	Revenue5y
Market Cap	Mcap	Revenue Per Share	RevenuePerShare
Next Earnings Date	NextEarning	Share Turnover 1y	ShareTurnover1y
Pre Tax Profit Margin	PreTaxProfitMargin	Yield	Yield

## 7. Performance Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Performance 1 Month	Chg1m	Performance 5 Year	Chg5y
Performance 1 Month Pct	Chg1mPct	Performance 5 Year Pct	Chg5yPct
Performance 1 Year	Chg1y	Performance 6 Month	Chg6m
Performance 1 Year Pct	Chg1yPct	Performance 6 Month Pct	Chg6mPct
Performance 10 Year	Chg10y	Week 52 Change	52WkChg
Performance 10 Year Pct	Chg10yPct	Week 52 High	52WkHigh
Performance 3 Month	Chg3m	Week 52 High Date	52WkHighDate
Performance 3 Month Pct	Chg3mPct	Week 52 Low	52WkLow
Performance 3 Year	Chg3y	Week 52 Low Date	52WkLowDate
Performance 3 Year Pct	Chg3yPct	YTD Pct	YTD Pct

## 8. Risk Metrics Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Alpha	Alpha	Standard Deviation 10y	StdDev10y
Alpha 5y	Alpha5y	Standard Deviation 10y A	StdDev10yA
Beta	Beta	Standard Deviation 1y	StdDev1y
Beta 1y	Beta1y	Standard Deviation 1y A	StdDev1yA
Beta 3y	Beta3y	Standard Deviation 3y	StdDev3y
Beta 5y	Beta5y	Standard Deviation 3y A	StdDev3yA
R Squared	R2	Standard Deviation 5y	StdDev5y
R Squared 5y	R25y	Standard Deviation 5y A	StdDev5yA
Standard Deviation	StdDev	Standard Deviation A	StdDevA

## 9. Technical Analysis Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Average Volume 5 Day	AvgVol5d	Average Volume 100 Day	AvgVol100d
Average Volume 10 Day	AvgVol10d	Average Volume 200 Day	AvgVol200d
Average Volume 20 Day	AvgVol20d	Moving Average 21 Day	MA21d
Average Volume 30 Day	AvgVol30d	Moving Average 50 Day	MA50d
Average Volume 50 Day	AvgVol50d	Moving Average 200 Day	MA200d

## 10. Reference Data Points

Long Data Point Name	Short Name	Long Data Point Name	Short Name
Buyer Id	BuyerID	Sector	Sector
Currency Id	Currency	Seller Id	SellerId
Effective Time	EffecTime	Sequence Number	SeqNum
Exchange Code	ExCode	Shares Outstanding	Outstanding
Firm Name Long	LongName	Shares Per Size Unit	SPSUnit
Industry	Industry	Start Time	StartTime
Long Description	Description	Sub Industry	SubIndustry
Market Place	MktPlace	Symbol	Symbol
Match Id	MatchId		

# Data Points Coverage - QMH formula (historical)

## 1. Historical Data Points

Long Data Point Name	Short Name
Accumulated Trade Value	AccumValue
Accumulated Volume	AccumVol
Ask Price	Ask
Ask Size	AskSize
Bid Price	Bid
Bid Size	BidSize
Change	Chg
Change Pct	ChgPct
Close	Close
Exchange Code	ExCode
Firm Name Long	LongName
High	High
Low	Low
Open	Open
Open Interest	OpenInt
Symbol	Symbol
Trade Count	TraeCount
VWAP	VWAP

# System Requirements

Quotestream Active Sheets only requires Microsoft Excel. It is compatible with multiple versions of Excel. See the compatibility list below:

- Excel 365 (Windows and Mac)
- Excel 2021
- Excel on web

## Frequently Asked Questions (FAQ)

- ***What do I need to install to use Quotestream Active Sheets?*** You do not need to install any additional software. All you need is a compatible Microsoft Excel.
- ***When I open my Quotestream Active Sheets spreadsheet, the data does not update. What should I do?*** Check that you correctly logged on with active credentials. After logging in, click the “Reset Connection” button in the Quotestream Active Sheets menu to re-create the connection request.
- ***I am getting an “Invalid Data Point” when I create a new formula. What should I do?*** Check if you use an available data point.
- ***Can I use Excel columns and rows references to automate formulas?*** Yes, Quotestream Active Sheets works with Excel row/column references. You can write formulas that include cell references. i.e =QMS(A1,C1).

## Support

If you need help with Quotestream Active Sheets, please ensure you use a compatible version of Microsoft Excel and valid credentials. If the issue persists, please contact QuoteMedia at <https://quotestream.com/contact-us>.

## Version Information

- Current Version: 1.16.0
- Last Update: May, 2025