AUTOMATE STOCK PRICE UPDATING IN MYM12

Add stock symbol to column A in Excel (AAPL is the symbol for Apple).

F	ile	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	Quick	Books	Team	
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A	2			•	$(\times \checkmark f_x)$	AAPL							
			А		В		с	D		E	F	G	н
1	Symb	ols for Ex	cel Stock		MYM Symbo	I	Pric	e					
2	AAPL												
3													
4													
5													

Select the cell(s) with the stock symbol (you can select the entire column) and click on Stocks button under the Data menu in the toolbar.

F	ile	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	Quick	Books T	eam	
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1	Symb	ols for Ex	cel Stock		MYM Symbol		Pric	e					
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If needed, you can select the specific stock to remove any ambiguity.

MN	Data Selector	×
	A2 AAPL × ,	ρ
	Data Type: Stocks	
	Select a matching result or try refining the term above. <u>Get help on using the Data Selector.</u>	^
	APPLE INC.	
	Stock - Nasdaq Stock Market: AAPL	
	Select	
	APPLE INC.	
	Stock - Wiener Boerse: AAPL	
	Select	
	APPLE INC.	
	Stock - SIX Swiss Exchange: AAPL	
U	Select	~

Excel fills in the remainder of the information. Click on the icon to select data you want to request...

A	2	~	: $\times \checkmark f_x$ APPLE INC. (XNAS:AAPL)					
	A		В	с	D	E		
1	Symbols for Excel Stock		M Symbol	Price				
2	盦 APPLE INC. (XNAS:AAPL)		—					
3								
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...and select "Price" from the dropdown menu to indicate you want the current price of the stock.

	А	В	с	D	
1 Symbo	ls for Excel Stock	M Symbol	Price		
2 🟛 APF	PLE INC. (XNAS:AAPL)	Field			
3					
4		Last trade time			
5		Low			
7		Market can			
8		Market Cap			
9		Name			
10		Official name			
11					
12		Open			
13		P/E			
14					
15		Previous close			11-
10		Price			11-
18		Drive (Eutoredad	h		11
19		Price (Extended	nours)		
20		Shares outstand	ing		
21		Ticker symbol			
22		neker symbol			Ш.,
23		Volume			Ш.,
24		Volume average			
25					
20		Year incorporate	d		¥.

The current price is now imported into the cell automatically.

	A	В	С	D
1	Symbols for Excel Stock	MYM Symbol	Price	
2	盦 APPLE INC. (XNAS:AAPL)		\$ 146.71	
3			\mathbf{A}	
4				
5				

Enter the stock symbol in the MYM Symbol (column B). This symbol must match the symbol used in MYM.

	А	В	С	D
1	Symbols for Excel Stock	MYM Symbol	Price	
2	盦 APPLE INC. (XNAS:AAPL)	AAPL	\$ 146.71	
3				

Continue to enter all of the symbols in MYM you want the current price for. In our example, we are requesting 7 stocks and Excel provides the price information.

	А	В	с	D
1	Symbols for Excel Stock	MYM Symbol	Price	
2	盦 APPLE INC. (XNAS:AAPL)	AAPL	146.71	
3	盦 MICROSOFT CORPORATION (XNAS:MSFT)	MSFT	249.22	
4	盦 AMAZON.COM, INC. (XNAS:AMZN)	AMZN	93.50	
5	盦 NETFLIX, INC. (XNAS:NFLX)	NFLX	317.15	
6	盦 TESLA, INC. (XNAS:TSLA)	TSLA	196.88	
7	盦 AT&T INC. (XNYS:T)	Т	19.25	
8	盦 WALMART INC. (XNYS:WMT)	WMT	142.47	
9				
10				

Run the Excel Macro (can be found under View menu) to create the import file that MYM will use to import the current prices. (Simply clicking Ctrl-M will run the macro.)

Macro			?	×	
Macro name	2:				
MYMStocks	;	Ť	R	un	
MYMStocks	;		<u>S</u> tep	Into	
			E	dit	
			Cr	eate	
			De	lete	
		-	<u>O</u> pti	ons	
M <u>a</u> cros in:	All Open Workbooks	~			
Description					
converts li	ist of stocks to import file for MYM				
			Ca	ncel	

* UPDATED ASSETS * % Change Symbol New Price **Old Price** Change AAPL 146.7100 130.0000 16.7100 12.9 AMZN 93.5000 91.5000 2.0000 2.2 MSFT 249.2200 252.0000 -2.7800 -1.1 NFLX 317.1500 311.1500 6.0000 1.9 19.2450 21.0000 -1.7550-8.4 TSLA 196.8800 191.3500 5.5300 2.9 151.3100 154.0000 WΜ -2.6900 -1.7 <∢_> **Update Prices** Sort by Symbol <F9> <Esc> Back Up without Updating Prices <F1>·Help <F4>·Print <Esc>·Back up

Click the Action Key (Enter or F10) to Update Prices, and you'll see the New Price updated to the prices from Excel.

That's it!

When you want new prices, just open the Excel file and run the Macro to create a new/updated import file. Then, open MYM, go to Portfolio/QuoteLink and click F9 – Get Last Download Prices to import the newest prices.

Note: Rather than manually entering your stocks into Excel one at a time, you can populate the columns in the Excel spreadsheet with your current symbols by printing your Update Prices screen in MYM and importing the symbols into the first two columns of the spreadsheet (the symbol in column A will be set to the data type Stock, and the symbol in column B will remain as the symbol used in MYM).

To import into MYM, just go to the QuoteLink screen from the Portfolio menu and click 'F9 – Get Last Download Prices'.