Welcome to the StreetSmart Edge™ Quick Reference Guide

This guide was created to highlight the more commonly used tools, features, and icons in StreetSmart Edge. It supports the other StreetSmart Edge educational resources, which include pre-recorded training seminars, live-online events, and live in-person workshops. Those who have first used at least one of these educational resources will gain the most benefit from this guide.

Throughout this guide, you will see the following recurring symbols:

- Shows you where right-click menus exist, for quick access to additional menus or actions
- Offers a tip to help you make the most of the tool
- Shows you where you can find out more about a topic

If you have not yet attended any type of training for StreetSmart Edge, we highly recommend that you explore Schwab’s broad range of resources to support you, available in various formats to fit your scheduling needs.

Refer to the final tab in this guide, Help & Education, for a listing of other opportunities to learn about trading with StreetSmart Edge.
Layouts & Global Settings

Default Layout
This layout provides the most commonly used tools: Account Details, Watch List, Symbol Hub. Symbol Hub includes the News and Trade tools, as well as a fully functional Chart tool.

Options Layout
Designed for options traders, this layout incorporates options-related settings and views into the following tools: Account Details, Trade, Chart, Watch List.

Trader Layout
Designed for active traders, this layout includes the following tools: Account Details, Trade, Chart, Watch List, News.

Technical Layout
Designed with the technical analyst in mind, this layout features the following technical data-gathering tools: Trade, Chart, Screener Plus.

Research Layout
This layout includes both fundamental and technical analysis tools for researching securities. In addition to providing Screener Plus, Watch List, and News tools, this layout also features the Symbol Hub tool. Symbol Hub provides News and Trade tools, as well as a fully functional Chart tool, complete with a Minichart Carousel and toggle button to switch between Research Data and Live Market Data.

Tip
Adding additional layouts to your workspace allows you to switch between different, comprehensive views with a single click.

Tip
Need privacy, or just more room? You can click here to hide the Balances Bar.

Tip
Customize your Header Quotes here, to show ones that matter most to you.

Tip
Have a quick question about your account or the trading platform? Chat directly with a live Schwab rep using Live Help.

Tip
Right-click Balances Bar to customize display.

Tip
Unread Messages
Workspace Zoom: Magnifies/Shrinks the view of the workspace.

Available Monday to Friday, 8 a.m. to 6 p.m. Eastern Time
Account Details

Balances (Margin Account)

Transactions

Set the custom date range to view up to 90 days of transaction history.

Order Status

Expands view to reveal additional view of the order.

Right-click

To set alert, chart, view news, columns & settings, etc.

Positions

Individual lot details, including hold period and source.

Hold Period

Short Term: Position held less than one year.

Long Term: Position held one year or longer.

Tip

Don’t know the origin of the shares? The Source column shows whether the lot was acquired through a trade, dividend, or corporate event.

Realized Gain/Loss

Individual lot details

Right-click

To set alert, chart, view news, columns & settings, etc.

Online Help

Not sure what the balance figure represents? The Online Help Manual provides an explanation of each balance figure.

Tip

Indicates the row expands to provide further information.
Quotes & Trading: Options & Conditional Orders

Options

Strategy Chooser
Option Symbol & Quote
Number of results to show
View: Basic
Contracts
View: Theoretical

Conditional Orders

Open order exists for this security
Position held in this security
Add up to three conditions
Add up to three orders

Tip: Use the same conditional order setup often? Save it as a template for easy access later.

In the Money:
Displays only the in-the-money strike prices that are closest to the current price of the underlying security.

Around the Money:
Displays the strike prices, both in-the-money and out-of-the-money, that are closest to the current price of the underlying security.

Out of the Money:
Displays only the out-of-the-money strike prices that are closest to the current price of the underlying security.

Price Delta:
When the Price is set to “Bid” or “Ask,” this field allows the addition of a delta to the bid or ask price for the order.

Cost:
When P&L selected as Variable, enter the cost basis into the Cost field.

Set custom expiration date, up to 60 calendar days.

Load a previously saved template.

Right-click
To access menu.

Right-click
To set alert, chart, view news, columns & settings, etc.

Options trading approval level

Stacked view

Side by Side view

In the Money:
Displays only the in-the-money strike prices that are closest to the current price of the underlying security.

Around the Money:
Displays the strike prices, both in-the-money and out-of-the-money, that are closest to the current price of the underlying security.

Out of the Money:
Displays only the out-of-the-money strike prices that are closest to the current price of the underlying security.

Tip: Use the same conditional order setup often? Save it as a template for easy access later.
Charts

Overview

Add chart tab

Tab Sync is On:
All chart tabs will update to reflect a symbol change.

Tab Sync is Off:
Only the current chart tab will update to reflect a symbol change.

At-a-glance timeframes
Set a specific date range for the chart.
Specifies a specific number of charting days to display.

Click and drag anywhere within the slider area to display the selected portion of the historical chart in the chart window.

Drag either side of the slider to lengthen or shorten the timeframe displayed.

Studies & Drawing Tools

Tip
You don’t have to add/delete studies each time – simply click to temporarily hide/unhide them from view.

Tip
Printing in black and white? Vary the line types and weights for easier distinction.

Online Help
Want to learn more about these chart studies? Located under the Help menu, the online Help Manual provides descriptions for each study.
Other Tools: Screener Plus & Recognia®

Screener Plus

Right-click
On the tab name or + to open a new screener.

Number of matches and time of last refresh.

Other Tools

Recognia®

Online Help
Learn more about technical events in Recognia’s Educational Material section.

Sets up technical alerts for a particular security.

Tools used to produce the results

Update Frequency

Tool Link Icon:
Windows with matching link icons will update when a symbol is double-clicked in this tool.

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Help & Education

In StreetSmart Edge

Live Help
Chat with a Schwab Representative.

Available Monday to Friday, 8 a.m. to 6 p.m. Eastern Time.

Online Help Manual

By Phone
Schwab representatives are available to assist you 24 hours a day, 7 days a week.

1 (800) 435-9050  Schwab Active Trader customer support
1 (317) 596-4501  Schwab customer support
  (If calling from outside the U.S.)
1 (800) 345-2550  TTY Service for the hearing impaired

Tip
Looking for in-person opportunities to enhance your investing knowledge? Check here for upcoming events and complimentary workshops in your area.

Online Resources

Active Trader Community

Learn from your fellow Active Traders

Launched in 2008, the Schwab Trading Community allows registered Active Traders to engage with their peers, as well as with Schwab experts, through online discussions, postings, blogs, and chats.

Registered community members also get the chance to participate in exclusive live webcast/chat sessions with Schwab experts.

To access or register: From StreetSmart Edge, click on the Schwab.com menu and select Trading Community.

Schwab Learning Center

Schwab’s Learning Center is your single point of entry for education, seminars, and research dedicated to helping you sharpen your trading skills.

Want to learn now? Find a variety of articles and on-demand pre-recorded seminars, available to you 24/7.

Looking for a chance to ask questions? Locate and register for live-online seminars, or live in-person events in your area.

To access: Log on to Schwab.com and, under the Research tab, click on Learning Center.
Schwab's StreetSmart Edge™ is available for Schwab Active Trading clients. Access to NASDAQ TotalView is provided for free to non-professional clients who have made 120 or more equity and/or options trades in the last 12 months, 30 or more equity and/or options trades in either the current or previous quarters, or maintain $1 million or more in household balances at Schwab. Schwab Active Trading clients who do not meet these requirements can subscribe to NASDAQ TotalView for a quarterly fee. Professional clients may be required to meet additional criteria before obtaining a subscription to NASDAQ TotalView. This offer may be subject to additional restrictions or fees, and may be changed at any time.

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Access to Electronic Services may be limited or unavailable during periods of peak demand, market volatility, systems upgrade, maintenance, or for other reasons.

Extended Hours Trading may not be suitable for all investors and poses certain risks. These risks include, but are not limited to, lower liquidity, higher volatility and wider spreads. To learn more, call 1-800-435-4000.

Direct access trading at Schwab involves additional eligibility requirements.

Options carry a high level of risk and are not suitable for all investors. Certain requirements must be met to trade options through Schwab. Please read the Options Disclosure Document titled "Characteristics and Risks of Standardized Options."

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