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May 23, 2024

# Interactive Brokers

## Introducing IBKR Desktop

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As with all investments, your capital is at risk

# IBKR Desktop

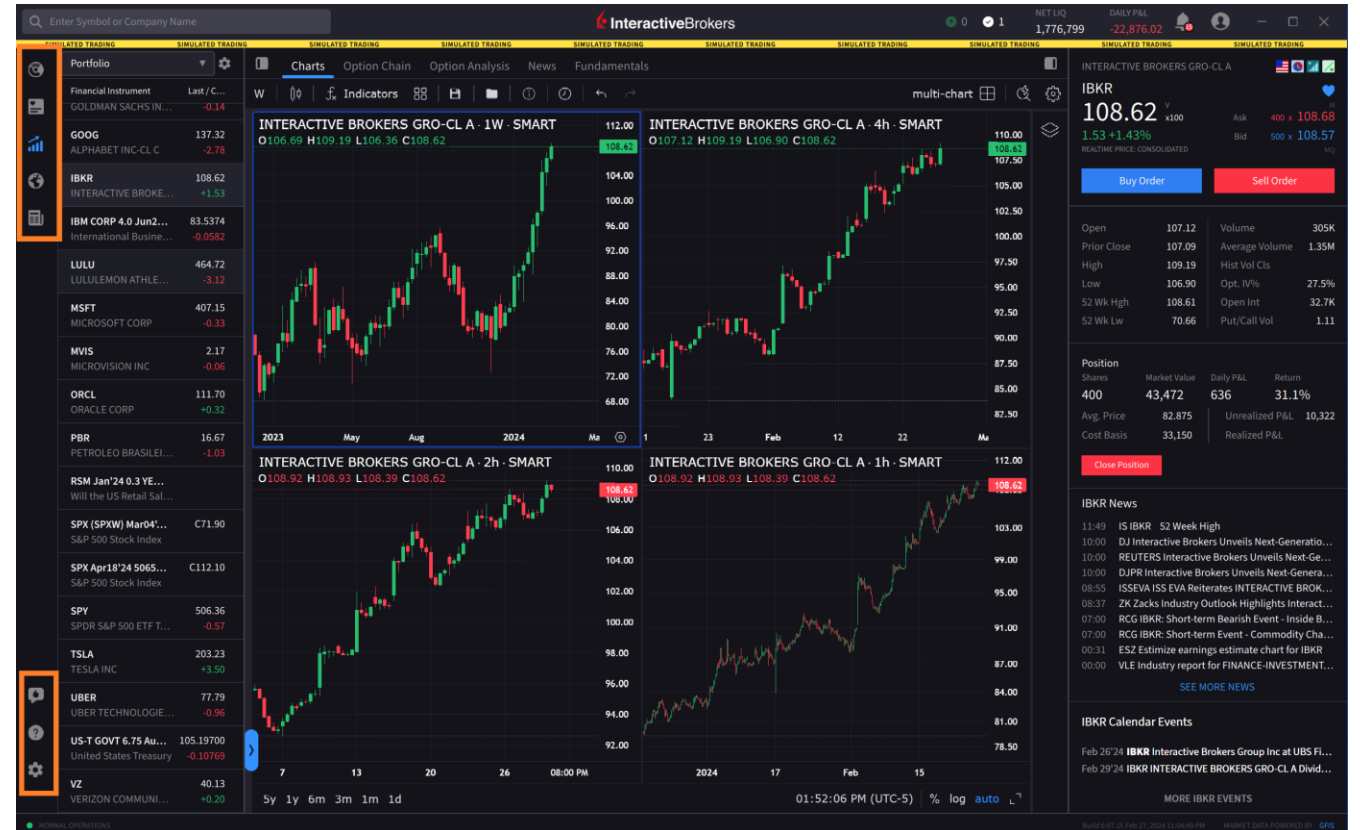
Presented by Andrew Wilkinson & Jeff Praissman

May 23, 2024

# Desktop Screens

## Access by Clicking on Icons

- Portfolio
- Watchlist
- Quote
- Screeners
- News
- Settings

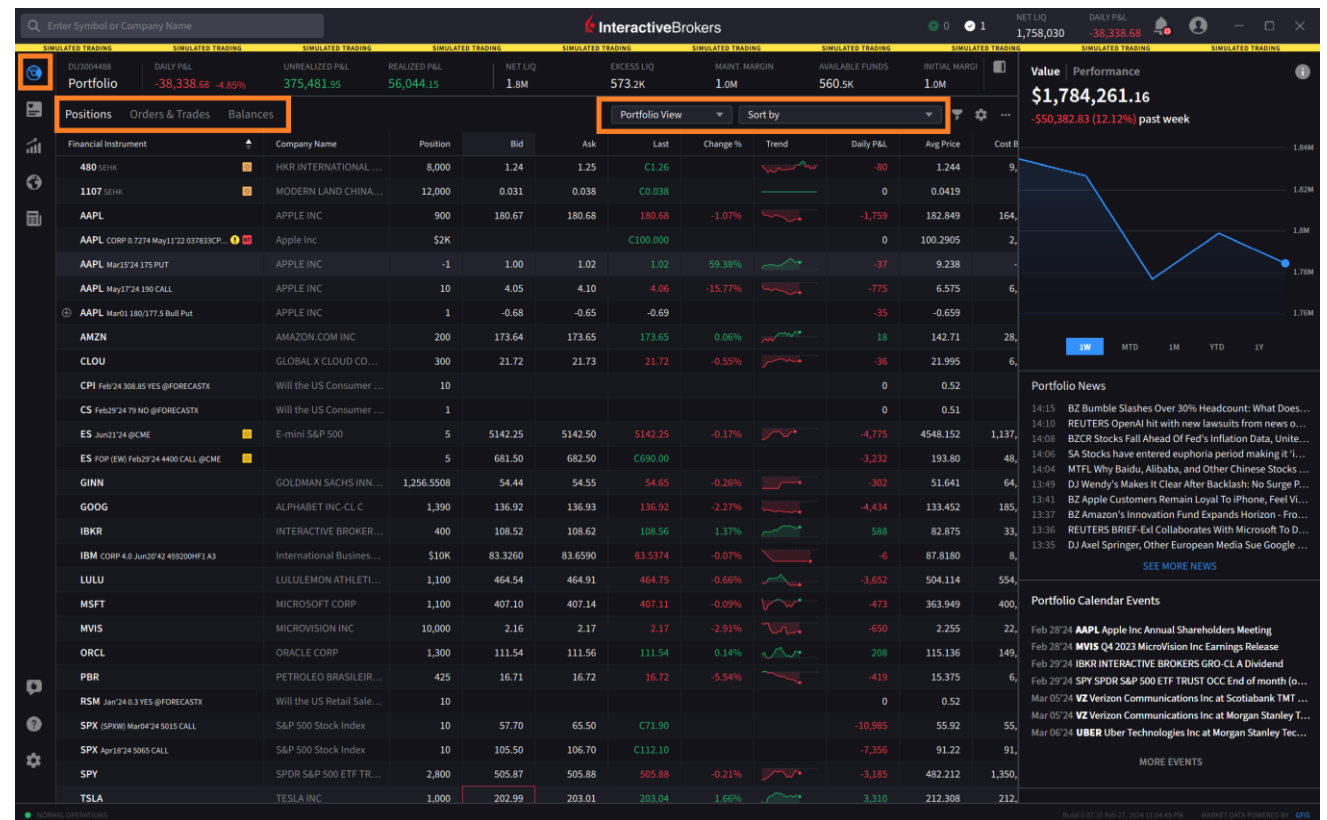


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# The Portfolio Screen

## Key Features

- Customize the View
- Sortable
- Create an Order Ticket Directly
- See Orders & Trades
- Balances



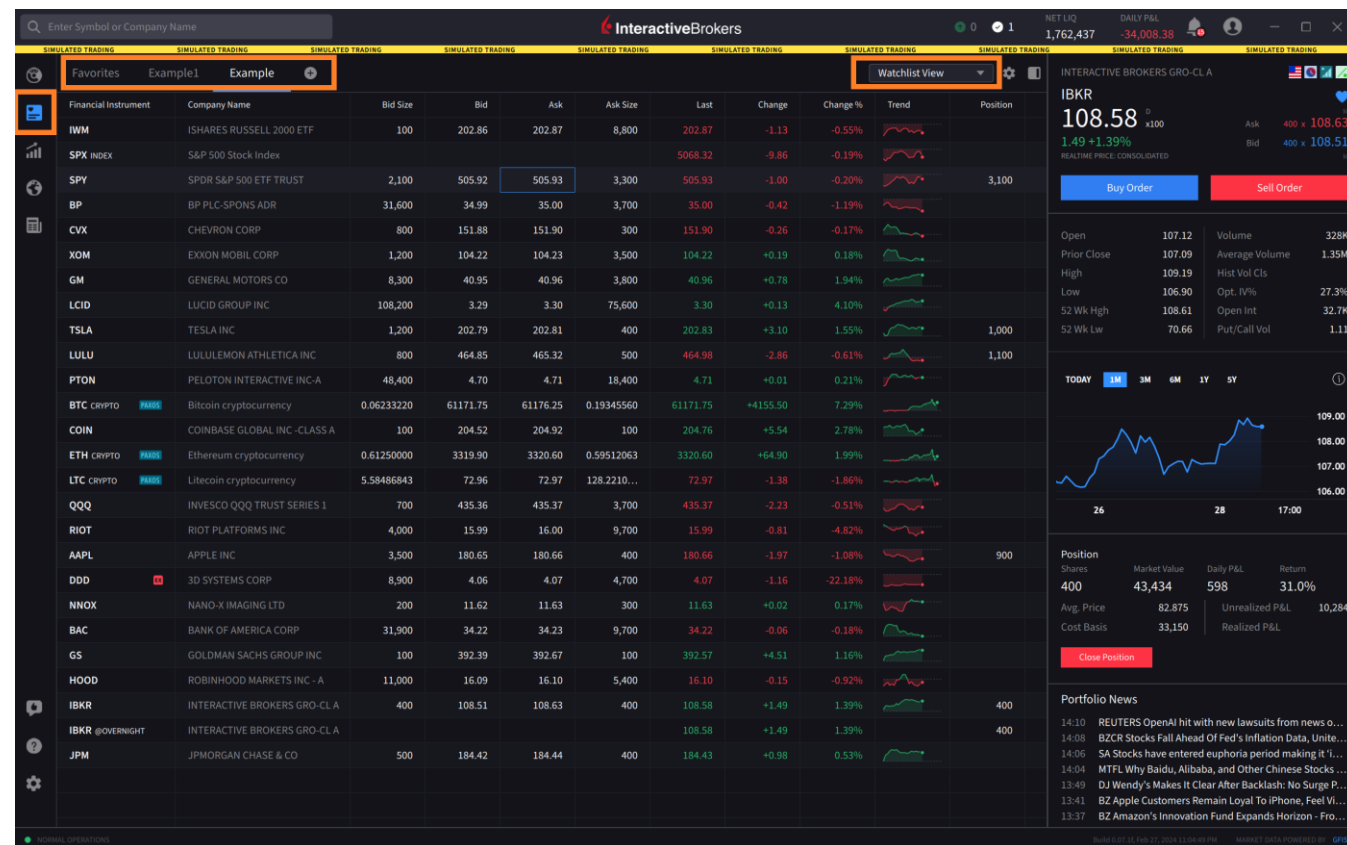
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# The Watchlist Screen

## Key Features

- Customize the View
- Create an Order Ticket Directly
- Use Previously Created Watchlists or Create New Ones

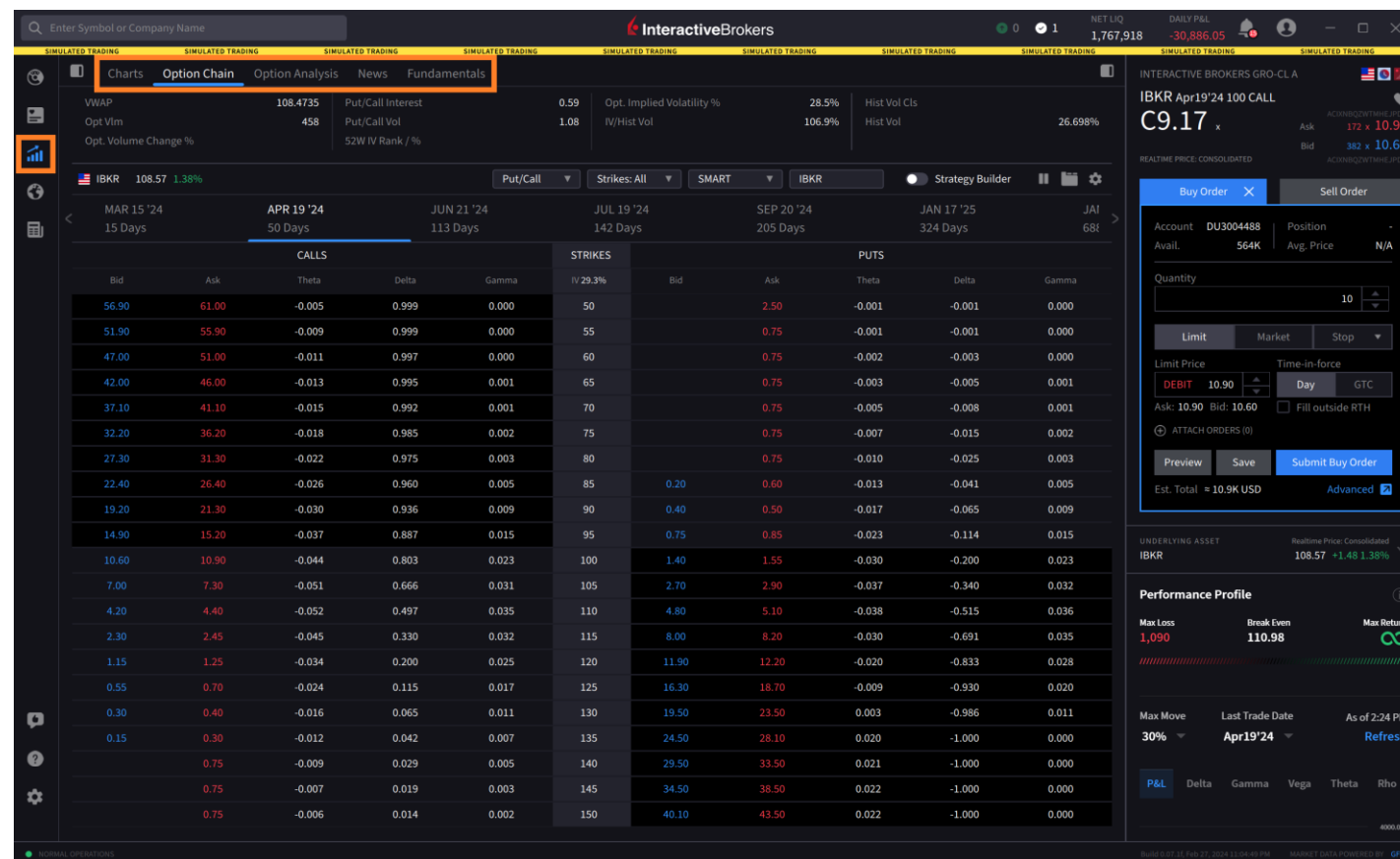


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# The Quote Screen

## Key Features

- Charts
- Option Chains
- Option Analysis
- News
- Fundamentals



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# Screeners

## Key Features

- US Stocks & ETFs
- Asia Stocks
- European Stocks
- MultiSort
  - Up to 10 Sort Factors
- Standard Filters

Financial Instru...	Company Name	Last	Change	Change %	Market Cap	Volume	Average Vol...	P/E	Open	High	Low	52W
<input type="checkbox"/>	MSFT	MICROSOFT CORP	406.79	-0.69	-0.17%	3,024.633B	7.49M	24.7M	36.8	408.33	409.30	405.32
<input type="checkbox"/>	AAPL	APPLE INC	180.57	-2.06	-1.13%	2,786.549B	32.9M	54.6M	28.1	182.51	183.12	180.13
<input type="checkbox"/>	NVDA	NVIDIA CORP	781.77	-5.24	-0.67%	1,960.4B	29.7M	46.4M	65.7	776.20	789.33	771.25
<input type="checkbox"/>	AMZN	AMAZON.COM INC	173.46	-0.08	-0.05%	1,804.34B	17.8M	48.6M	60.1	172.56	174.05	172.27
<input type="checkbox"/>	META	META PLATFORMS INC-CLASS A	485.53	-1.52	-0.31%	1,239.801B	8.65M	19.0M	31.8	485.10	491.05	483.72
<input type="checkbox"/>	GOOGL	ALPHABET INC-CL A	135.57	-3.31	-2.38%	1,695.791B	24.5M	30.1M	24.9	137.87	138.01	135.52
<input type="checkbox"/>	GOOG	ALPHABET INC-CL C	136.80	-3.30	-2.36%	1,711.923B	19.0M	22.5M	25.2	139.13	139.28	136.76
<input type="checkbox"/>	LLY	ELI LILLY & CO	756.47	-8.53	-1.12%	716.281B	1.82M	3.24M	130	760.98	763.00	751.66
<input type="checkbox"/>	TSM	TAIWAN SEMICONDUCTOR-SP ADR	127.75	-0.84	-0.65%	568.729B	4.40M	12.3M	24.9	128.50	128.58	126.65
<input type="checkbox"/>	TSLA	TESLA INC	202.16	+2.43	1.22%	646.804B	82.6M	110M	47.2	200.31	205.30	198.44
<input type="checkbox"/>	AVGO	BROADCOM INC	1287.43	-8.80	-0.68%	603.702B	579K	3.33M	39.2	1293.00	1298.52	1282.97
<input type="checkbox"/>	BRK B	BERKSHIRE HATHAWAY INC-CL B	412.56	+3.65	0.89%	593.209M	2.32M	3.55M	0	408.40	414.67	407.71
<input type="checkbox"/>	JPM	JPMORGAN CHASE & CO	184.10	+0.65	0.35%	532.293B	3.67M	9.42M	11.4	183.43	185.20	182.96
<input type="checkbox"/>	WMT	WALMART INC	59.62	+0.03	0.05%	480.873B	8.23M	8.55M	31.2	59.51	59.76	59.31
<input type="checkbox"/>	LVMUY	LVMH MOET HENNESSY-UNSP ADR	184.20	-0.05	-0.03%	462.383B	136K	204K	28	184.21	184.50	182.55
<input type="checkbox"/>	UNH	UNITEDHEALTH GROUP INC	488.18	-25.24	-4.92%	451.835B	6.62M	3.66M	20.5	495.70	497.88	484.39
<input type="checkbox"/>	V	VISA INC-CLASS A SHARES	285.51	+2.34	0.83%	573.44B	2.39M	5.46M	32.8	282.10	285.87	282.08
<input type="checkbox"/>	MA	MASTERCARD INC - A	477.20	+2.45	0.52%	445.696B	1.09M	2.54M	40.4	474.17	478.80	473.67
<input type="checkbox"/>	NVO	NOVO-NORDISK A/S-SPONS ADR	121.56	-0.67	-0.55%	414.044B	1.92M	4.50M	44.8	122.00	122.15	120.93
<input type="checkbox"/>	XOM	EXXON MOBIL CORP	104.42	+0.39	0.37%	414.334B	8.25M	20.4M	11.7	104.20	105.43	104.00
<input type="checkbox"/>	TOYOF	TOYOTA MOTOR CORP	23.78	+0.03	0.13%	387.97B	5.90K	94.3K	0.1	24.56	24.56	23.72
<input type="checkbox"/>	JNJ	JOHNSON & JOHNSON	161.00	+0.02	0.01%	387.739B	3.37M	7.33M	30.5	161.00	161.32	160.29
<input type="checkbox"/>	TM	TOYOTA MOTOR CORP -SPON ADR	237.45	-0.59	-0.25%	386.857B	108K	319K	10.7	237.93	238.19	237.12
<input type="checkbox"/>	PG	PROCTER & GAMBLE CO/THE	159.68	+0.38	0.24%	375.554B	1.75M	7.45M	26.7	159.08	159.97	158.64
<input type="checkbox"/>	HD	HOME DEPOT INC	376.80	+1.24	0.33%	375.652B	1.34M	3.50M	25	375.56	379.84	375.06
<input type="checkbox"/>	ASML	ASML HOLDING NV-NY REG SHS	938.30	-3.07	-0.33%	380.49B	339K	1.16M	43.6	939.04	943.50	935.10

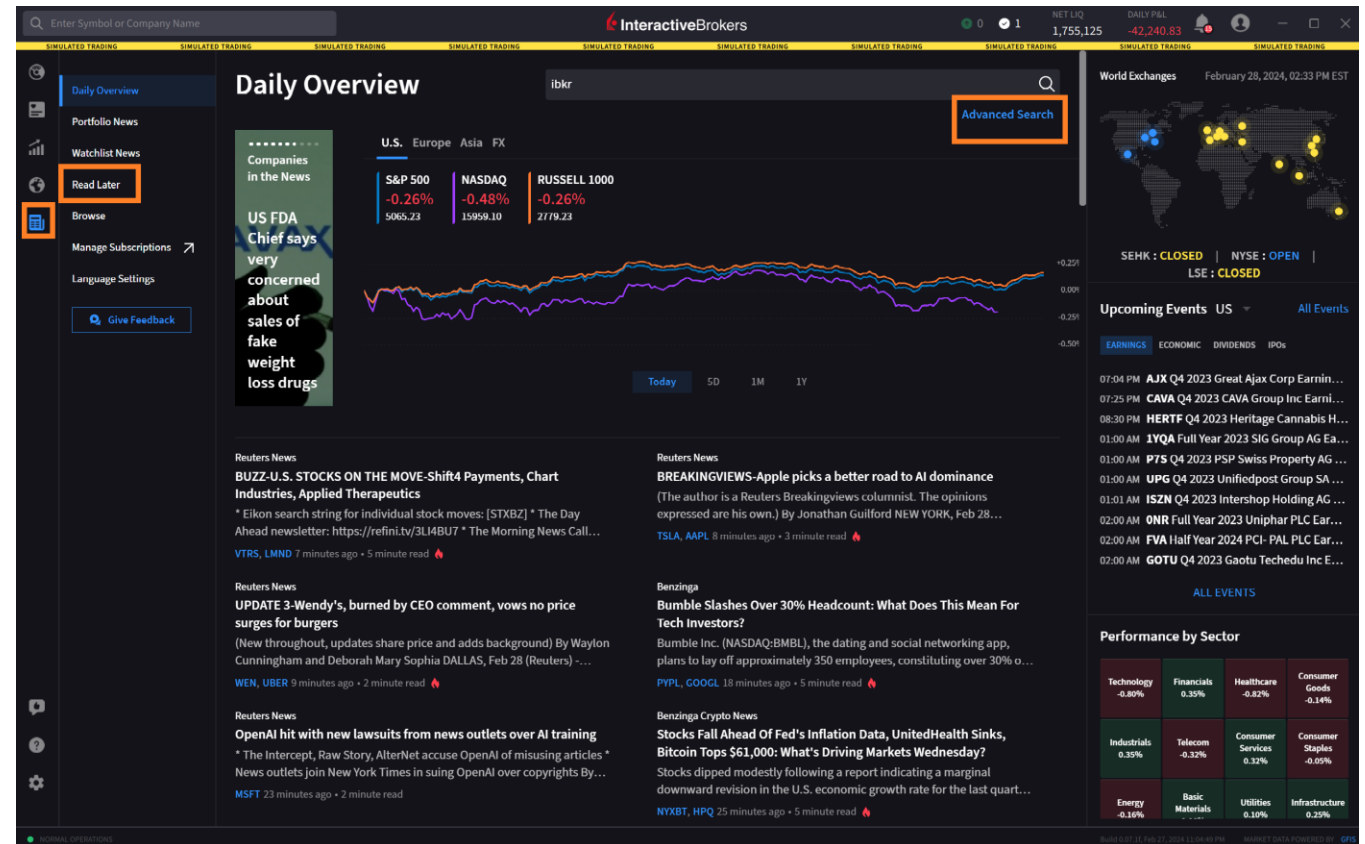
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# The News Screen

## Key Features

- Daily Overview
- Save News Stories to Read Later
- Easily Sort in Advanced Search by:
  - Content Type
  - Importance,
  - Read Time, & More



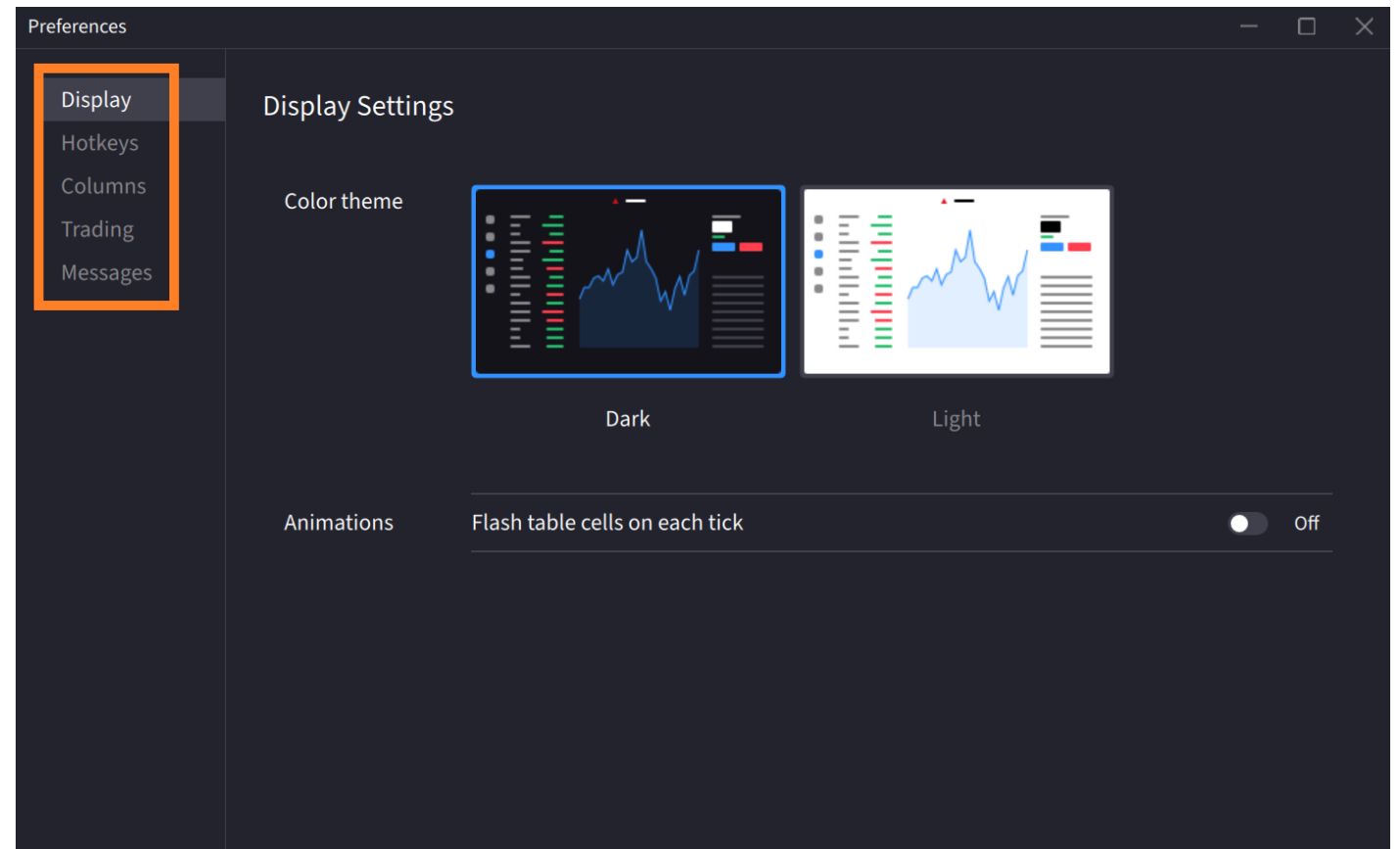
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# Settings

## Key Features

- Change Display Color
- Create Hotkeys
- Edit Columns
- Trading Presets
- Customize Message Popups

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# Order Entry

## Key Features

- Simple, Elegant Design
- Set Presets
- Attach Bracket Orders
- Advanced Order Types and Features Easily Accessible

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The screenshot displays the Interactive Brokers Order Entry interface for the symbol IBKR. At the top, the account identifier 'INTERACTIVE BROKERS GRO-CL A' is shown alongside flags for the United States, Canada, and the United Kingdom. The main header displays the stock price '108.52' with a change of '1.43 +1.34%'. To the right, the Ask price is '108.53' (500 x) and the Bid price is '108.51' (200 x). Below this, the 'REALTIME PRICE: CONSOLIDATED' is noted. The interface is divided into 'Buy Order' and 'Sell Order' tabs, with 'Buy Order' currently selected. The order entry form includes fields for 'Account' (DU3004488), 'Position' (400), 'Avail.' (563K), and 'Avg. Price' (82.875). The 'Quantity' field is set to '300' with 'Shares' and 'USD' as unit options. The order type is set to 'Limit', with a 'Limit Price' of '108.53'. The 'Time-in-force' is set to 'Day', and the 'Fill outside RTH' checkbox is unchecked. A section labeled 'ATTACH ORDERS (0)' is highlighted with an orange box. At the bottom, there are buttons for 'Preview', 'Save', and 'Submit Buy Order'. The 'Est. Total' is shown as '≈ 32.5K USD', and an 'Advanced' link with a magnifying glass icon is also highlighted with an orange box.

# For Your Reference



■ IBKR Desktop Trading Course- [LINK](#)

■ Desktop User Guide - [LINK](#)

■ Press Release - [LINK](#)

■ Web Landing Page -

[LINK](#)



[LINK](#)



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