

Quote Loader Extension by Mike Bray Moneydance 2019-2020

V9.1

Use at your own risk

This system has been tested on the latest release of Moneydance, 2019/2020.

The Quote Loader system has been developed Mike Bray and signed by Infinite Kind (Moneydance) as a safe extension.

OVERVIEW

[Impatient to start, skip to page 2 or see Quick Start Guide video here](#)

The system provides an end to end solution, obtaining quotes from a choice of sources and entering them into the relevant Currency/Security History window, all from a single window within Moneydance. The system can obtain Security prices, Exchange Rates, Market indices, Cryptocurrency Rates and prices for Cryptocurrency Investments. For UK user's prices are consistent, no switching between Pence and Pounds and back again. Returned prices in Pence will be automatically converted into Pounds before they are entered into the Currency/Security History window. Quotes and/or Securities in a foreign currency are converted into Moneydance's Base Currency automatically. It provides quotes for stocks and funds, from many stock exchanges US, Canada, UK, Europe and Australia to name but a few. The process of obtaining quotes from the selected source is fast and error free.

The system has the following advantages.

- You can see for each security, its Name and Ticker symbol.
- You can see for each security Last Price & Price Date held in the Currency/Security History window.
- You can Select the Source to obtain quotes from.
- You can Get Prices for Exchange Rates and Securities or Exchange Rates only.
- You can determine if you want to get quotes for Securities you no longer hold.
- You can see each quote being returned with its New Price, Trade Date and Trade Currency.
- You can do a reality check last quote before saving the data to Moneydance.
- You can add a New Price and Trade Date to any security that is not found.
- You can select the securities to be saved to Moneydance, all or selected prices.
- You can test a symbol to check that a price can be returned.
- You can setup Auto Updating based on Daily, Weekly Quarterly, Monthly or Yearly intervals & time.
- You can retrieve history data going back to the last date in a Currency/Security History window.

When running the Quote Loader look under HELP – ONLINE HELP for further information. There is no guarantee that the Quote Loader system will continue to operate. Factors outside the developer's control may change and the system will be unable to return quotes. Please do not use the data obtained from the Quote Loader for commercial gain. User's should be aware of these warnings and only use the free Quote Loader system based on the acceptance of these conditions.

For how to set up Market Indices and/or cryptocurrencies in Moneydance see separate PDF.

Example screen of the Quote Loader interface

MoneyDance Quote Loader 3025

Automatic Run Types: Time of Run: **At Start Up** (Securities) **Manual Only** Last Run (24/05/2020) Next: 09/06/2020 **Help**

Reset Auto Run (Currencies) **Manual Only** Last Run (24/05/2020) Next: 25/05/2020 **CSV Settings**

Include zero accounts? Process Currencies Decimal Digits: **4** Export Folder: C:\Users\derek\Documents

Select	Ticker	Exch Mod	Name	Source	Last Price	Price Date	New Price	Trade Date	Trade Currency	Volume
<input type="checkbox"/>	AAPL		Apple Inc	Yahoo HD	\$340.3001	09/06/2020	341.5800	09/06/2020	USD	15113074
<input type="checkbox"/>	AIR		Airbus SE	FT	€0.6920	22/05/2020	0.8000	09/06/2020	GBX(80.0000)	119200
<input type="checkbox"/>	GB0033772517		Dimensional Emerging Markets Core Equity Fund GBP Income	FT HD	£31.3700	22/05/2020	33.8300	08/06/2020	GBP	
<input type="checkbox"/>	IE00B0V9T862		PIMCO Funds: Global High Yield Bond Fund Institutional GBP Hedged Inc	FT	£5.4500	22/05/2020	5.8900	08/06/2020	GBP	
<input type="checkbox"/>	IE00B1W56S93		BlackRock iShares Pacific Index Fd Inst Acc USD	FT	€11.7161	21/05/2020	13.6488	05/06/2020	USD(16.6200)	
<input type="checkbox"/>	LLOY	LSE	Lloyds Banking Group plc	FT	€0.2812	22/05/2020	0.3534	09/06/2020	GBX(35.3400)	301660000
<input type="checkbox"/>	LU0641006290		Global Sovereign Bonds Sterling hedged	FT	€29.2300	22/05/2020	28.9700	09/06/2020	GBX(2.897.0000)	4760
<input type="checkbox"/>	PHIA		Royal Philips	FT	€35.0542	22/05/2020	37.3702	09/06/2020	EUR(41.7500)	2660000
<input type="checkbox"/>	RY		Royal Bank of Canada	FT	€47.8509	22/05/2020	55.8706	09/06/2020	CAD(95.1700)	753880
<input type="checkbox"/>	TRBCX		T. Rowe Price Blue Chip Growth Fund	FT	\$130.4000	22/05/2020	136.5800	08/06/2020	USD	
<input type="checkbox"/>	USB-PP		U.S. Bancorp Depository Shares	Yahoo	€21.1622	22/05/2020	22.3472	09/06/2020	USD(27.2100)	2003
<input type="checkbox"/>	VHGX		Vanguard Global Equity Fund Investor Shares	FT	\$28.1600	22/05/2020	31.2700	08/06/2020	USD	
<input type="checkbox"/>	VOW3		Volkswagen AG	FT	€132.7800	22/05/2020	145.5800	09/06/2020	EUR	1860000
<input type="checkbox"/>	VTHRX		Vanguard Target Retirement 2030 fund	FT	€26.4509	22/05/2020	29.9277	08/06/2020	USD(36.4400)	
<input type="checkbox"/>	CAD		Cur:Canadian Dollar	FT	1.7034	24/05/2020	1.7086	09/06/2020	CAD	
<input type="checkbox"/>	EUR		Cur:Euro	FT	1.1172	24/05/2020	1.1204	09/06/2020	EUR	
<input type="checkbox"/>	USD		Cur:US Dollar	FT	1.2176	24/05/2020	1.2725	09/06/2020	USD	

Click to Select all lines Include Volume Data Retrieve missed prices

Save Selected Values **Get Exchange Rates** **Get Prices** **Save Parameters** **Create Prices CSV** **Close**

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YouTube Tutorial Videos can be found at:

Short Video [here](#)

Full Video [here](#)

READ THE ENTIRE PDF

BEFORE ATTEMPTING TO USE THE QUOTE LOADER.

Note: If you are running a VPN this may slow down Quote Loader, some quotes may be missed or the retrieval of data may fail. If the issue persists try turning off your VPN.

QUOTE LOADER

Quote Loader is a third-party extension that has been reviewed and signed by Infinite Kind (Moneydance).

As a signed extension Quote Loader can be found under EXTENSIONS – MANAGE EXTENSIONS

Simply click EXTENSIONS – MANAGE EXTENSIONS find Quote loader and click INSTALL.

Once installed re-start Moneydance - installation complete.

Uninstall the Quotes and Exchange Rates Updater extension to Prevent Conflicts!!

INITIAL SETUP

Make a FILE – EXPORT BACKUP in case things do not turn out as expected.

Start the extension by selecting “Quote Loader” under EXTENSIONS to give.

NOTE: Mouse hover over a button or most tick boxes to display help tips.

- If “Include zero accounts?” box is ticked then:
 - If a security is assigned to an investment account but has a zero balance then it will appear whether or not it is listed in the Stock Prices section on the Summary Page.
 - If a security is not assigned to an investment account then it will only appear if it is listed in the Stock Prices section on the Summary Page.
- If you wish to update currency exchange rates tick “Process Currencies”. For a currency to be listed under “Ticker” symbols it must be selected in Moneydance to “Show on summary page” under TOOLS – CURRENCIES select currency - EDIT.
- Most securities and currencies are quoted in no more than 4 decimal places but cryptocurrencies require up to 8. Use the “Decimal Digit” dropdown to select the number of decimal places returned.
- In the “source” column change the default “Do not load” as required by selecting a quote source.

Right click (ctrl-click for Mac) on Source heading to open a popup. →

Select the most used Source.

Then to change an individual source. Click in a

source box and use a dropdown to make a selection. →

If you not sure what source to select see [here](#).

- In the “Exch Mod” column, if required, change the default, Blank-Do not use an exchange, selection. Click in an Exch Mod box to open a popup. → Select the Exchange were the Security is traded and click OK.

To select the same exchange for all other securities see [here](#).

If you not sure what Exchange to select see [here](#).

- If you wish to update trade Volumes tick “Include Volume Data” box.
- If you wish to retrieve data for all dates since the date of the last data stored in a Currency/Security History window, tick “Retrieve missed prices” box. Active only when source is Yahoo HD or FT HD. **Important** see [here](#).
- Click “Save Parameters”, OK. The next time you open the extension all the selection will be remembered.

OBTAINING QUOTE

Make a FILE – EXPORT BACKUP in case things do not turn out as expected.

If not already running start the extension by selecting “Quote Loader” under EXTENSIONS to give.

MoneyDance Quote Loader 3025

Automatic Run Types: At Start Up (Securities) Manual Only

Time of Run: Last Run (24/05/2020) Next 09/06/2020

Reset Auto Run (Currencies) Manual Only

Last Run (24/05/2020) Next 25/05/2020 CSV Settings

Include zero accounts? Process Currencies Decimal Digits 4 Export Folder : C:\Users\derek\Documents

++ Denotes History Data Available

Select	Ticker	Exch Mod	Name	Source	Last Price	Price Date	New P...	Trade Date	Trade Currency	Volume
<input type="checkbox"/>	AAPL		Apple Inc	Yahoo HD	\$340.3001	09/06/2020	345.2500	09/06/2020	USD	23283524
<input type="checkbox"/>	AIR		Airbus SE	FT	€0.6920	22/05/2020	0.7800	09/06/2020	GBX(78.0000)	138410
<input type="checkbox"/>	GB0033772517		Dimensional Emerging Markets Core Equity Fund GBP Income	FT HD	€31.3700	22/05/2020	33.8300	08/06/2020++	GBP	
<input type="checkbox"/>	IE00B0V9T862		PIMCO Funds: Global High Yield Bond Fund Institutional GBP Hedged Inc	FT	€5.4500	22/05/2020	5.6900	08/06/2020	GBP	
<input type="checkbox"/>	IE00B1W56S93		BlackRock iShares Pacific Index Fd Inst Acc USD	Yahoo	€11.7161	21/05/2020	0.0000			
<input type="checkbox"/>	LLOY	LSE	Lloyds Banking Group plc	FT	€0.2812	22/05/2020	0.3523	09/06/2020	GBX(35.2300)	410190000
<input type="checkbox"/>	LU0641006290		Global Sovereign Bonds Sterling hedged	FT	€29.2300	22/05/2020	29.0200	09/06/2020	GBX(2.902.0000)	4760
<input type="checkbox"/>	RY		Royal Bank of Canada	Do not load	€47.8509	22/05/2020	0.0000			
<input type="checkbox"/>	TRBCX		T. Rowe Price Blue Chip Growth Fund	FT	\$130.4000	22/05/2020	136.5800	08/06/2020	USD	
<input type="checkbox"/>	USB-PP		U.S. Bancorp Depository Shares	Yahoo	€21.1622	22/05/2020	22.3308	09/06/2020	USD(27.1900)	6489
<input type="checkbox"/>	VHGEX		Vanguard Global Equity Fund Investor Shares	FT	\$28.1600	22/05/2020	31.2700	08/06/2020	USD	
<input type="checkbox"/>	VOW3		Volkswagen AG	FT	€132.7800	22/05/2020	145.5600	09/06/2020	EUR	2270000
<input type="checkbox"/>	VTHRX		Vanguard Target Retirement 2030 fund	FT	€26.4509	22/05/2020	29.9277	08/06/2020	USD(36.4400)	
<input type="checkbox"/>	CAD		Cur:Canadian Dollar	FT	1.7034	24/05/2020	1.7095	09/06/2020	CAD	
<input type="checkbox"/>	EUR		Cur:Euro	FT	1.1172	24/05/2020	1.1234	09/06/2020	EUR	
<input type="checkbox"/>	USD		Cur:US Dollar	FT	1.2176	24/05/2020	1.2743	09/06/2020	USD	

Click to Select all lines Include Volume Data Retrieve missed prices

Save Selected Values Get Exchange Rates Get Prices Save Parameters Create Prices CSV Close

Progress Bar may pause. This is normal.

66%

New Price

160.4411
96.3769
3682.0000
66.3300
5.9100
0.0
60.9800
0.0
59.1852
0.0000
0.0000
0.0000

III AAPL,216.16,USD

Do not tick until step 3.

The Moneydance Status Bar at the bottom of the main Moneydance window display the quote data as it is obtained

Status of obtaining quotes in indicated by colour.

- Yellow-Being obtained.
- Green-Obtained.
- Original colour-Do not load.
- Red-Not found.

Procedure if all Securities & Quotes are in Moneydance’s Base Currency

1. Click “Get Prices” button and when progress bar reaches 100% click OK.
2. If security is returned in Red or original colour, with a zero price, see [here](#)
3. Tick the “Click to Select all lines” box or individual tick boxes to Select the values to be saved.
4. Click “Save Selected Values”, click OK button OR click “Close” to cancel Save.
5. Close the window.

Note: To obtain exchange rate only, tick Process Currencies, set Source for currencies and click Get Exchange Rates.

Export Data.

If you so require you can export the data obtained to a CSV file. The menu EXPORT ON SAVE, EXPORT ON AUTO RUN (tick as required) and CHOOSE FOLDER for the exported CSV file. Or you can use the Create Prices CSV button once you have chosen a folder and made a selection of the lines to be saved. Note: Create Prices CSV button does not save data to Moneydance.

CSV Settings

Export on Save

Export on Auto Run

Choose Folder

allows you to

File name format is priceexportyyyymmddhhmmss.csv

	A	B	C	D	E
1	Ticker	Name	Price	Date	Volume
2	AAPL	Apple Inc	120.4072117	16/01/2019	173710
3	AIR	Airbus SE	80.41766215	17/01/2019	551260
4	LLOY	Lloyds Banking Group plc	0.561	17/01/2019	59450000
5	PHIA	Royal Philips	27.34271303	17/01/2019	619230
6	CAD	Canadian Dollar	1.7164	17/01/2019	0
7	EUR	Euro	1.1322	17/01/2019	0
8	USD	US Dollar	1.2911	17/01/2019	0

File Format

Note: The decimal separator used in the CSV file is always a “.” period.

Procedure if one or more Securities or Quotes are not in Moneydance's Base Currency.

- A. If Moneydance Base Currency is different from one or more securities/quote source currencies.

Example: Base Currency GBP. The security Volkswagen in TOOLS–SECURITIES–Volkswagen set to Euro.

Quote for Volkswagen obtained from the source are in Euro's.

Ticker	Exch Mod	Name	Source	Last Price	Price Date	New Price	Trade Date	Trade Currency
VOW3		Volkswagen ...	FT	€137.1200	12/09/2018	144.0000	14/09/2018	EUR

- B. If one or more quotes are not in the currency of the security set in Moneydance.

Example The security BlackRock... In TOOLS–SECURITIES–BlackRock.. set to GBP. Quote for BlackRock.. obtained from the source are in USD. Base Currency is GBP.

Ticker	Exch Mod	Name	Source	Last Price	Price Date	New Price	Trade Date	Trade Currency
IE00B1W56S93		BlackRock i...	FT	£12.7065	11/09/2018	12.8601	13/09/2018	USD(16.7400)

Note: Currency difference £ symbol in Last Price column and Source value in USD in Trade Currency Column.

For the correct prices to be entered into Moneydance the process is in two stages.

- First stage.
Obtain and save the exchange rates.
In these example EUR and USD. In case A the exchange rate is used to convert the price in the Currency/Security History window to the Base Currency used in other areas of Moneydance. In case B the exchange rate is used in the second stage to convert the source quote price into the Base Currency before entering the value into the New Price column. In the BlackRock.. example the New Price will be converted from USD to GBP using the Last Price USD Currency Exchange Rate.
- Second stage.
Obtain and save quotes.

Currency conversion. The process involves using an Currency Exchange Rate to perform a currency conversion. For each security the system tries to use the exchange rate date that is the same as the security Trade Date. If this does not exist it looks into the past to find the first available exchange rate. This works well unless the exchange rate it finds is so out of date which would result in an inaccurate currency conversion. To ensure this does not happen set the Currency Exchange Rate source to Yahoo HD to retrieve a Currency Exchange Rate History. This way the conversion will be accurate.

The process steps are as follows: -

- Ensure the "Process Currencies" box is ticked.
- Ensure Currency Exchange Rate source is Yahoo HD and that the "Retrieve missed prices" box is ticked.
- Click "Get Exchange Rates" button. When process is complete click OK.
- Tick the boxes to select the exchange rates to be saved.
- Click "Save selected values" button, click OK.
- Click "Get Prices" button. When process is complete click OK.
- If security is returned in Red or original colour, with a zero price, see [here](#)
- Tick the "Click to Select all lines" box or individual tick boxes to select the values to be saved. It's OK to save Exchange Rates again.
- Click "Save Selected Values" button.

FINDING AND USING THE CORRECT SECURITY TICKER SYMBOL.

The first step is to determine which source you intend to use to obtain a quote for each security. It's possible one source will cover all your needs. Or it could be you need to use a mix of sources to find quotes for all your securities. Yahoo and FT provide current prices. During trading these sources provide a delayed current price, after trading a closing price. Yahoo/FT HD can provide historical data, see [here](#)

Ticker symbols are unique within an exchange, but are not unique across all exchanges. For example, WBC is a valid Ticker symbol and both sources will return the same price, the price for WABCO Holdings. However, WBC is also the Ticker symbol for Westpac Banking Corp. and this company is traded on a number of stock exchanges, including Australia, New Zealand and various European Exchanges, each trading in a local currency. So, in such cases you must check that the Trade Currency and Price returned matches your expectations and if necessary, add an exchange code or select an exchange that results in the required outcome.

The Ticker symbol and stock exchange separator is “.” for Yahoo and “:” for FT. FT also supports some Yahoo “.” exchange codes.

Example. Apple Inc does not require an exchange code just use “APPL” for both sources. Airbus requires a “.PA” (AIR.PA) when the source is Yahoo, but a “:PAR” for FT (AIR:PAR). FT also supports (AIR.PA).

To help you determine the correct Ticker symbol and if required exchange code use

<https://markets.ft.com/data/equities>

<https://uk.finance.yahoo.com/lookup>

In both cases enter the security name or the Ticker symbol itself, start with the Ticker symbol alone, to determine if it is recognised and if it requires an exchange code.

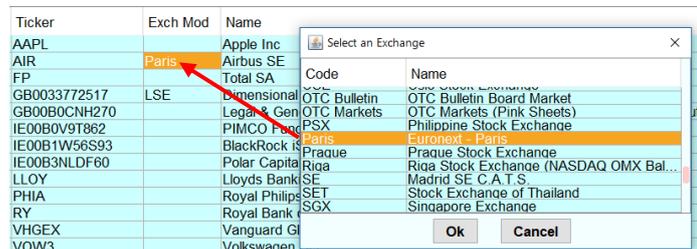
There are two ways the handle exchange codes.

1. When a source requires that the Ticker symbols has an exchange code enter then both under Moneydance TOOLS – SECURITIES. Example, if you have decided to use FT enter AIR:PAR or for Yahoo AIR.PA. Then set Exch Mod box to Blank - Do not use an exchange.
2. A more flexible approach is to only include the Ticker symbol under TOOLS – SECURITIES and use the Exch Mod column to add the exchange code automatically to the Ticker symbol. This way when you change sources the exchange code is changed automatically. There is no need to change the Ticker symbol under TOOLS – SECURITIES.

Double clicking in a Exch Mod box opens an exchange selection menu. Click OK once a selection is made.

Highlight a Exch Mod box, right click (ctrl-click for Mac) to open a menu. One of the selections is “Set all exchanges to”. In the example this is Paris. Clicking on this sets all securities to have the Exch Mod of Paris.

You can then set any individual securities Exch Mod box to the required exchange by double clicking it.



Ticker	Exch Mod	Name	Source
AAPL		Apple Inc	FT
AIR	Paris	Test AIR:PAR	FT
FP		Copy AIR:PAR	FT
GB0033772517	LSE	Set all exchanges to Paris	Yahoo
GB00B0CNH270		Set all exchanges to Paris	FT

To Test or Copy the Ticker symbol plus exchange code, if any, highlight, right click (ctrl-click for Mac) on an Exch Mod box and then select as required.

Be aware for a given security there are cases were the Ticker symbol changes, so to change sources you will still have to edit the Ticker symbol under TOOLS – SECURITIES. For securities that use the ISIN identifier e.g. GB0033772517 the two sources handle them differently. For FT select Blank - Do not use an exchange. For Yahoo select the appropriate exchange. Sometimes, the ticker is completely different for the same security.

RETRIEVING HISTORICAL DATA

The purpose of this feature is to retrieve data going back to the last date entry in a Currency/Security History window. If you last ran Quote Loader on 27th May and you are now running on 2nd June Quote Loader will load the prices for the 28th May to the 2nd June, if they are available. It will not fill in any gaps before 27th May. Does not overwrite your existing history. Yahoo HD (Historical Data) can retrieve data going back about 1 years, FT HD about 28 days, if available. “++” after the Trade Date denotes history has been retrieved. FT HD does not support historical data for Equities, only ETFs, nor does it support Exchange Rates. If the source Yahoo or FT is selected the “Retrieve missed prices” box has no effect. Only data for the most recent available date is retrieved.

RETURNED PRICE IS ZERO.

There could be two reasons why a quote is returned as a zero.

1. The Ticker symbol for the quote is incorrect for the quote source used. See [here](#).
2. You have tried all quote sources and none supports the quote or you have selected “Do not load quote”. In these cases, you will need to obtain a price from another source and enter it manually in to the associated “New Price” box. Double click on the box. Swipe over the existing value and enter the new value and press Enter. Then enter a Trade Date in the next box. Default date is today's date, edit as required. Note: Clicking again in the edit mode will open a calendar.

AUTOMATIC UPDATE

This feature will update your exchange rates and securities in the background without the need to open the Quote Loader extension. You can set the frequency of updates independently for exchange rates and Securities. Updates can be set to Daily, Weekly, Monthly, Quarterly or Yearly. The feature Retrieve Missed Prices can also be activated, see [here](#). You can use the associated calendar to set first day/date as appropriate. You can set the automatic update run at a specified time or just at start-up. A “Time of Run” Automatic Update will occur on the due date whilst Moneydance is open. On automatic update you will notice the update occurring in the background by quotes appearing in the status line at the bottom of the Moneydance window. If on opening Moneydance it is detected you have missed a due date/time the update will start. The Next Run date will increment after each update. The parameters used for the updates are those you saved when clicking the Save Parameter button. Before using this feature make sure you are happy with the quotes you are getting when using the Get Prices button, you want get to check the values that will be saved in automatic operation. If there is an error obtaining quote a message appears and the offending Price Date turns red with an asterisk. If you have securities or quotes that are not in the Base Currency then to prevent currency conversion errors it's a good idea to set currency updates to daily. For background read the paragraph Currency conversion [here](#).

Once you have completed the setup below click the button so that Quote Loader accepts the changes. Then close Quote Loader, but leave Moneydance and your computer running or make sure Moneydance is running at the set update time.

RUN TYPE DROPDOWN

DAILY



Click in box to open the calendar to set the start date.

Results in the message “Set the ‘Next Run Date’ you wish Automatic Running to start. It will run daily from then on.

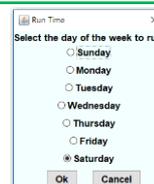
WEEKLY



Results in the “Select the day of the week to run” window opening.

Make a selection and Click OK.

Click in the Next date box to open a calendar and select the date you wish Automatic Running to start. The selection should be the same day of the week.



MONTHLY

Monthly  Last Run (24/09/2018) Next 30/09/2018

Results in the “Select the day of the month to run” window opening.

Make a selection and Click OK.



Click in the Next date box to open a calendar and select the date you wish Automatic Running to start. The selection should be the same date.

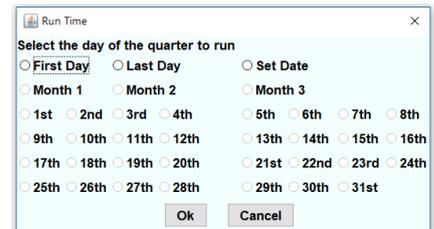
If there are insufficient days in a month, e.g. you set the date to 30th and run it in February, the last day of the month will be used.

QUARTERLY

Quarterly  Last Run (24/09/2018) Next 01/10/2018

Results in the “Select the day of the quarter to run” window opening.

Make a selection and Click OK.



Click in the Next date box to open a calendar and select the date you wish Automatic Running to start. The selection should be the same date within a quarter.

If there are insufficient days in a month, e.g. you set the date to 30th and run it in February, the last day of the month will be used.

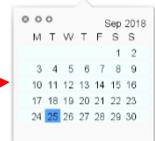
YEARLY

Yearly  Last Run (24/09/2018) Next 01/10/2018

Click in box to open the calendar to set the start date. 

Results in the message “Set the ‘Next Run Date’ to the date you wish Automatic Running to start.

It will run on the same day each year.



UPDATE TIME

Time of Run At Start Up

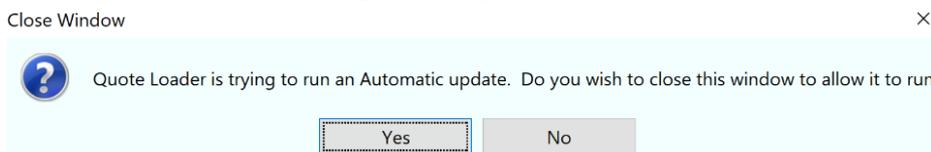
Click on “Time of Run” dropdown and select update time.

With Moneydance open, but Quote Loader closed, an Automatic Update will occur at the set time or At Start Up on the date programmed in the selections above.



If Moneydance is opened and the due Time of Run, on the due date has passed, Automatic Update will start.

After you make any changes to the Auto Run settings click the  button so that Quote Loader accepts the changes. If the changes result in Quote Loader wanting to do an Auto Run immediately, the following message appears.



If you click NO, another Auto Run will be attempted at the next available “Time of Run” time.

HAVE FUN *Derek Kent*