EXTRA-ORDINARY XL

Excel spreadsheet - training, modelling and problem resolution
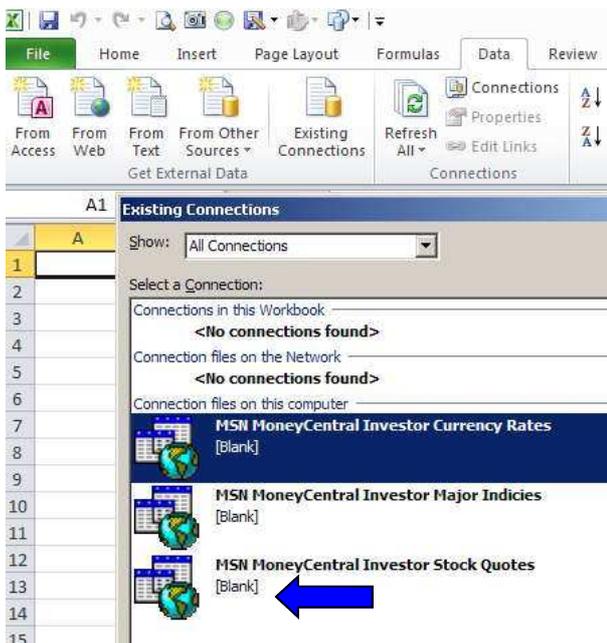
TIP OF THE MONTH - AUGUST 2013

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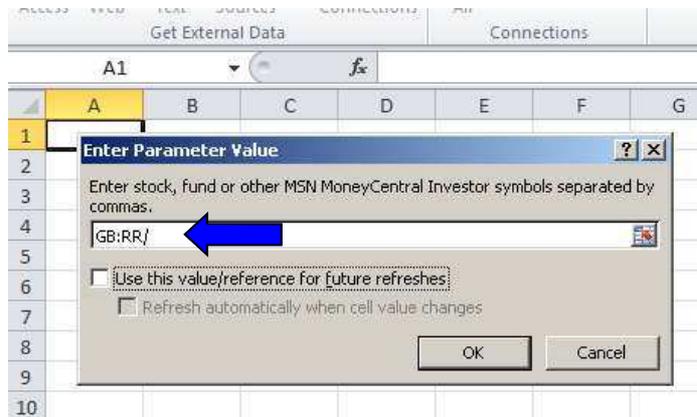
Portfolio Perfection

Did you know that Excel can link to online Share & Equity data?

Following on from our June 2013 monthly tip "Get Off the Web!" here's how to create an Excel spreadsheet that keeps track of your share portfolio in real time.

In a new workbook click on the Data menu tab, then Existing Connections. Standard links and ones that you have created (for another Tip of the Month in the future) will appear on the menu options. See the screen shot on the left. For this exercise highlight the "MSN Money Central Investor Stock Quotes" option, and the Open button. Here Excel asks where to put the data. Opt for Cell A1 in this example, and OK it.

Excel then asks for a parameter value. The required value is a symbol that represents the Stock code in the MSN Money website. For how to find the stock code for your particular share see the EOXL Quick Tip below, but just for now enter "GB:RR/". Check the "Use this value.." box and press OK.

In a few moments a large amount of data about Rolls Royce Holdings PLC (GB:RR/) fills the spreadsheet from the MSN Money website. Lots of formatting and hyperlink creation has taken place, but if you opted for cell A1 earlier, the latest share price for Rolls Royce Holdings, according to MSN Money is shown in cell D4.

Select Connections on the Data tab and click on the Properties button. Check all the boxes under Refresh Control and change the refresh interval to 1 minute. Now watch cell D4 change every minute as the stock value changes.
But if you cannot wait hit the refresh button.

EOXL Quick Tip: To get the Stock Symbols and more, go to our website for the full length version of this Monthly Tip. Or download a sample spreadsheet from our sister site accountancytemplates.com

Extra-Ordinary XL training can cost less than you think. Group or One-to-One coaching will pay early dividends, and ensure you get the most from your software investment.
For those special projects that your staff just cannot figure out, the spreadsheet that always throws up errors or the file that takes ages to update each month, our spreadsheet modelling service can help streamline your systems, reduce frustration and improve efficiency. Call us now for a no obligation chat.