HTTP request

/ref-data/symbols

Parameters

| **Parameter** | **Details** |
| --- | --- |
| **format** | • Parameter is optional • Value can only be csv • When parameter is not present, format defaults to JSON |
| Response **Key** | **Description** |
| **symbol** | refers to the symbol represented in [Nasdaq Integrated symbology](http://www.nasdaqtrader.com/trader.aspx?id=CQSsymbolconvention) (INET). |
| **name** | refers to the name of the company or security. |
| **date** | refers to the date the symbol reference data was generated. |
| **isEnabled** | will be true if the symbol is enabled for trading on IEX. |
| **type** | refers to the common issue type  (AD – ADR -- An American depositary receipt (**ADR**) is a certificate issued by a U.S. bank representing shares in a foreign stock traded on a U.S. exchange. RE – REIT -- A real estate investment trust is a company that owns, and in most cases operates, income-producing real estate. REITs own many types of commercial real estate, ranging from office and apartment buildings to warehouses, hospitals, shopping centers, hotels and timberlands. CE - Closed end fund A closed-end fund or closed-ended fund is a collective investment model based on issuing a fixed number of shares which are not redeemable from the fund. Unlike open-end funds, new shares in a closed-end fund are not created by managers to meet demand from investors. SI - Secondary Issue -- What is 'Secondary Offering' A secondary offering is the sale of new or closely held shares by a company that has already made an initial public offering (IPO). There are two types of secondary offerings.  LP - Limited Partnerships -- A **limited** **partnership** exists when two or more partners jointly conduct a business in which one or more is only liable to the extent of the amount of money that partner has invested. CS - Common Stock -- Common stock represents an equity ownership in the company and entitles shareholders the right to vote on management issues at the annual shareholder's meeting. Common stockholders may, or may not, receive dividends, depending on management's decision about distributing profits. ET – ETF -- An ETF, or exchange-traded fund, is a [marketable security](https://www.investopedia.com/terms/m/marketablesecurities.asp) that tracks a stock index, a commodity, bonds, or a basket of assets. Although similar in many ways, ETFs differ from mutual funds because shares trade like common stock on an exchange. |
| **iexId** | unique ID applied by IEX to track securities through symbol changes. |

# Chart

### HTTP request

/stock/aapl/chart

/stock/aapl/chart/5y

/stock/aapl/chart/2y

/stock/aapl/chart/1y

/stock/aapl/chart/ytd

/stock/aapl/chart/6m

/stock/aapl/chart/3m

/stock/aapl/chart/1m

/stock/aapl/chart/1d

/stock/aapl/chart/date/20180129

/stock/aapl/chart/dynamic

Options

Range Description Source

5y Five years Historically adjusted market-wide data

2y Two years Historically adjusted market-wide data

1y One year Historically adjusted market-wide data

ytd Year-to-date Historically adjusted market-wide data

6m Six months Historically adjusted market-wide data

3m Three months Historically adjusted market-wide data

1m One month (default) Historically adjusted market-wide data

1d One day IEX-only data by minute

date Specific date IEX-only data by minute for a specified date in the format YYYYMMDD if available. Currently supporting trailing 30 calendar days.

dynamic One day Will return 1d or 1m data depending on the day or week and time of day. Intraday per minute data is only returned during market hours.

Parameters

Parameter Details

chartReset • Optional

• boolean. If true, 1d chart will reset at midnight instead of the default behavior of 9:30am ET.

chartSimplify • Optional

• boolean. If true, runs a polyline simplification using the Douglas-Peucker algorithm. This is useful if plotting sparkline charts.

chartInterval • Optional

• number. If passed, chart data will return every Nth element as defined by chartInterval

changeFromClose • Optional

• boolean. If true, changeOverTime and marketChangeOverTime will be relative to previous day close instead of the first value.

chartLast • Optional

• number. If passed, chart data will return the last N elements

Response

| **Key** | **Type** | **Availability** |
| --- | --- | --- |
| **minute** | string | is **only** available on 1d chart. |
| **high** | number | is available on **all** charts. |
| **low** | number | is available on **all** charts. |
| **volume** | number | is available on **all** charts. |
| **label** | number | is available on **all** charts. A variable formatted version of the date depending on the range. Optional convienience field. |
| **changeOverTime** | number | is available on **all** charts. Percent change of each interval relative to first value. Useful for comparing multiple stocks. |
| **date** | string | is available on **all** charts. |
| **open** | number | is available on **all** charts. |
| **close** | number | is available on **all** charts. |
| **unadjustedVolume** | number | is **not** available on 1d chart. |
| **change** | number | is **not** available on 1d chart. |
| **changePercent** | number | is **not** available on 1d chart. |
| **vwap** | number | is **not** available on 1d chart. |

Volume-weighted average price

In finance, volume-weighted average price is the ratio of the value traded to total volume traded over a particular time horizon. It is a measure of the average price at which a stock is traded over the trading horizon.

### Collections

### Returns an array of quote objects for a given collection type. Currently supported collection types are sector, tag, and list

### HTTP request

### /stock/market/collection/sector?collectionName=Health%20Care

### /stock/market/collection/tag?collectionName=Computer%20Hardware

### /stock/market/collection/list?collectionName=iexvolume

### Parameters

| **Parameter** | **Details** |
| --- | --- |
| **collectionName** | • Required •Name of the sector, tag, or list to return and is **case sensitive**.  Supported lists can be found under the [list](https://iextrading.com/developer/docs#list) section.  Supported sectors can be found under the [sector-performance](https://iextrading.com/developer/docs#sector-performance) section.   1. Communication Services 2. Consumer Discretionary 3. Consumer Staples 4. Energy 5. Financials 6. Health Care 7. Industrials 8. Materials 9. Real Estate 10. Technology 11. Utilities   Supported tags can be found in each stock [company](https://iextrading.com/developer/docs#company) object. |

Response

| **Key** | **Type** | **Description** |
| --- | --- | --- |
| quote | object | See the [quote](https://iextrading.com/developer/docs#quote) section. |
| Quote |  |  |

HTTP request

[/stock/aapl/quote](https://api.iextrading.com/1.0/stock/aapl/quote)

Parameters

Parameter Details

• Optional  
• If set to true, all percentage values will be multiplied by a factor of 100 (Ex: /stock/aapl/quote?displayPercent=true)

| Response |
| --- |
| | Key | Type | Description | | --- | --- | --- | | symbol | string | refers to the stock ticker. | | companyName | string | refers to the company name. | | primaryExchange | string | refers to the primary listings exchange. | | sector | string | refers to the sector of the stock. | | calculationPrice | string | refers to the source of the latest price.  ("tops", "sip", "previousclose" or "close") | | open | number | refers to the official open price | | openTime | number | refers to the official listing exchange time for the open | | close | number | refers to the official close price | | closeTime | number | refers to the official listing exchange time for the close | | high | number | refers to the market-wide highest price from the SIP. 15 minute delayed | | low | number | refers to the market-wide lowest price from the SIP. 15 minute delayed | | latestPrice | number | refers to the latest price being the IEX real time price, the 15 minute delayed market price, or the previous close price. | | latestSource | string | refers to the source of latestPrice.  ("IEX real time price", "15 minute delayed price", "Close" or "Previous close") | | latestTime | string | refers to a human readable time of the latestPrice. The format will vary based on latestSource. | | latestUpdate | number | refers to the update time of latestPrice in milliseconds since midnight Jan 1, 1970. | | latestVolume | number | refers to the total market volume of the stock. | | iexRealtimePrice | number | refers to last sale price of the stock on IEX. (Refer to the [attribution section](https://iextrading.com/developer/docs/#attribution) above.) | | iexRealtimeSize | number | refers to last sale size of the stock on IEX. | | iexLastUpdated | number | refers to the last update time of the data in milliseconds since midnight Jan 1, 1970 UTC or -1 or 0. If the value is -1 or 0, IEX has not quoted the symbol in the trading day. | | delayedPrice | number | refers to the 15 minute delayed market price during normal market hours 9:30 - 16:00. | | delayedPriceTime | number | refers to the time of the delayed market price during normal market hours 9:30 - 16:00. | | extendedPrice | number | refers to the 15 minute delayed market price outside normal market hours 8:00 - 9:30 and 16:00 - 17:00. | | extendedChange | number | is calculated using extendedPrice from calculationPrice. | | extendedChangePercent | number | is calculated using extendedPrice from calculationPrice. | | extendedPriceTime | number | refers to the time of the delayed market price outside normal market hours 8:00 - 9:30 and 16:00 - 17:00. | | change | number | is calculated using calculationPrice from previousClose. | | changePercent | number | is calculated using calculationPrice from previousClose. | | iexMarketPercent | number | refers to IEX’s percentage of the market in the stock. | | iexVolume | number | refers to shares traded in the stock on IEX. | | avgTotalVolume | number | refers to the 30 day average volume on all markets. | | iexBidPrice | number | refers to the best bid price on IEX. | | iexBidSize | number | refers to amount of shares on the bid on IEX. | | iexAskPrice | number | refers to the best ask price on IEX. | | iexAskSize | number | refers to amount of shares on the ask on IEX. | | marketCap | number | is calculated in real time using calculationPrice. | | peRatio | number | is calculated in real time using calculationPrice. | | week52High | number | refers to the adjusted 52 week high. | | week52Low | number | refers to the adjusted 52 week low. | | ytdChange | number | refers to the price change percentage from start of year to previous close. | |

Get list of symbols available for the week – table 1 symbols table

Do batch retrieve to get all symbols

* Can divide insert by sector?
* Or do a loop

Drop into a new table

Calculate top price earnings ratio

Also look at where high/low percentage is the greatest and has a price earnings ratio greater than

Select top price earnings ratio by sector and equity type

Populate into summary table

Retrieve top 5 with highest price earnings ratio

Clear table.

Do filter by sector, equity type or all for stock pick, issue type

Allow to save the stocks – yes – substitute this list for what currently gets passed to symbols list

OR allow for selection

This creates a – work table to start from

I also need a summary table to write results into.

Create a new tab or two where you select stock picking strategy

Pass suggested stock to stock list – user decides which stocks to save?

Step 1.

Copy symbols page – create new version

Modify to retrieve data from collections api vs chart api – this provides more useful parameters for stock picking

Save output to a work table – stock Universe

Step 2

Create new page with filters – Sector, Issue, Market and determine top 5 stock pick either by those filters or for everything – use example from class with filters as framework for this page

Save the results to Stock Pick list table

Step 3

Refresh – modify this page to refresh our stock pick tables