The XCharter Font Package

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1 Package Features

The XCharter fonts are extensions of the Bitstream Charter fonts, adding oldstyle figures, superior figures and small caps in all styles. The original Charter fonts were created by famed font designer Matthew Carter in the late 1980’s to enhance legibility of the output from printers of that era (laser, dot matrix, thermal and inkjet) with resolutions that would now be considered low—not far from modern screen resolutions. Their low contrasts, high x-heights and use of piecewise linear outlines where possible may make them interesting again as fonts that will render well on small devices and perhaps projected slides. (It’s worth noting that the same designer provided Georgia for Microsoft. It is widely considered to be one of the clearest serifed fonts for viewing on screen, and bears a number of similarities to Charter, though the latter is heavier.)

As of version 1.09 (2017-06-25) there is a new collection of Cyrillic glyphs in XCharter, copied from Andrey Panov’s Khartiya, an extension of the free Charter fonts, with small caps included. Some new figure styles were also copied from Khartiya—inferiors, numerators and denominators. Along with these additions, there are now slanted versions for those who wish to have both slanted and italic text available to meet distinct semantic purposes. Note that figures and uppercase slanted and italic are almost identical (except for slanted Q and italic Q) but lower-case forms are distinct.

Starting with version 1.1, support has been added for typesetting in the Serbian variant of Cyrillic, with some changes to the Italic and BoldItalic Cyrillic glyphs and a new option in the main package. These are described more fully below.

Support files are provided for T1, TS1, LY1, T2A and OT2 encodings, the last two being to support the Cyrillic component of XCharter. The package has a number of options:

- \texttt{scaled=.98}, for example, scales all text to 98% of specified size;
- \texttt{lining} (or just \texttt{lf}) makes lining figures (0123456789) the default for text—this is set automatically and does not need to be entered explicitly;
- \texttt{oldstyle} (or \texttt{osf}) sets the figure style in text mode to oldstyle (0123456789) with numeral one like a shortened 1, but math mode will always use lining figures;
- \texttt{proportional} (or \texttt{p}), new as of version 1.23, changes the default tabular figure style to proportional.
- \texttt{oldstyleI} (or \texttt{osfI}) sets the figure style in text mode to oldstyle (0123456789) with numeral one like a shortened I, but math mode will always use lining figures;
• sups sets the style for superscript figures (e.g., footnote markers) to XCharter’s superior figures rather than using the default text inserts in mathematical superscripts. This option has no effect if a KOMA class is in force.

• scosf makes oldstyle figures the default in small cap text, no matter what the global figure setting may be.

• serbianc is useful only with the T2A encoding. It modifies one slot in upright and slanted shapes and five slots in italic shapes, as expected in Serbian Cyrillic. See the last section for examples.

Changes in version 1.23

There are some substantial additions in version 1.23, some requiring newtx, version 1.71 or higher:

• XCharter.sty now works with all flavors of LaTeX—unicode and non-unicode—but there may be some small differences in output. Essentially all previous options and macros are supported and there are new ones available, some of which are limited to unicode engines.

• Previous versions of XCharter had only two normal figure styles: tabular lining (the default) and proportional oldstyle. Version 1.23 adds two more so there are separate TLF (tabular lining figures), LF (proportional lining figures), TOsF (tabular oldstyle figures) and OsF (proportional oldstyle figures). Two new options have been added to globally select the default figures style. Option p (or proportional) and t (or tabular). A new command \useproportional (preamble only) has the same effect as option proportional.

• With the new figures came new macros to select them, no matter what the defaults may be. There are two forms, one that switches the figures until further notice and the other a macro with an argument.

<table>
<thead>
<tr>
<th>Switch</th>
<th>Command</th>
<th>Effect</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>tlfstyle</td>
<td>texttlf</td>
<td>TLF</td>
<td>{\lfstyle123}, \texttlf{123}</td>
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<td>lftstyle</td>
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<td>TOsF</td>
<td>{\tosftstyle123}, \texttosf{123}</td>
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<tr>
<td>osftstyle</td>
<td>textosf</td>
<td>OsF</td>
<td>{\osftstyle123}, \textosf{123}</td>
</tr>
</tbody>
</table>

There are also the text font switches \liningnums, \tabularnums, \oldstylenums and \proportionalnums, each of which changes only one attribute of the figure style and alignment. For example, \liningnums changes the style to lining and \tabularnums changes the figure alignment to tabular.

• There is a theorem font option similar to those in newtx and newpx. A new font family, XCharterTH, is made from the italic and bold italic faces of XCharter, but having upright figures and punctuation that, IMO, look better than slanted ones in theorem statements and the like. For details, consult the brief descriptions below and the more discursive version in the documentation to newtx. There is a theoremfont option to XCharter that works exactly the same as in newtx.

• The figure style in theoremfont will by default be the same as your chosen figure style. Option thmlining will ensure that lining figures are always used.
• oldSS specifies the preference for the old Capital Sharp S rather than the newer form, U+1E9E, ß.

• There are new options that affect only unicode engines:
  – nofontspec prevents XCharter.sty from loading fontspec.
  – type1text (or type1) specifies processing the text font using type1 mode. This does not prevent fontspec from loading.
  – defaultfeatures= gives you a place to set the default text font features for fontspec.

Special Macros:

• \useproportional (usable only in the preamble) may be used for changing the text figure alignment to proportional though math mode will use tabular lining figures. (New in 1.23.)

• \useosf (usable only in the preamble) may be used for changing the text figure style to osf though math mode will use lining figures.

• \useosfI (usable only in the preamble) may be used for changing the text figure style to osfI though math mode will use lining figures.

• \textsu prints its argument in superior figures, e.g., \textsu{12} results in \(\text{¹²}\). The effect is the same with {\textstyle 12}.

• \textinf prints its argument in inferior figures, e.g., \textinf{12} results in \(\text{₁²}\). The effect is the same with {\textstyle 12}. (In versions of XCharter prior to 1.221, \textinf was named \textin, but the latter conflicts with hyperref which redefines it to point to U+2208.)

• \textlf prints its argument in lining figures, e.g., \textlf{12} results in \(12\). The effect is the same with {\textstyle 12}.

• {\osfstyle 23} prints 23 (OldStyle,Proportional) while {\tabularnums 23} prints 23, Lining with whatever figure alignment is in force. There are also macros \tabularnums, \proportionalnums, \oldstylenums, \tosfstyle and \tlfstyle with the expected behaviors.

• Numerators and denominators are normally used only for constructing fractions, but may if needed be called using \textnumerator and \textdenominator. They are about 7% smaller than superiors and inferiors. You may use \textde and \textnu as abbreviations, though the latter will not be available if babel is loaded with greek option. As of version 1.24, you may prevent \textnu from overwriting the babel/greek definition by using the new option notextnu to XCharter. In any case, a new command \textnum takes the place of the old XCharter \textnu.

• The \textfrac macro allows you to write, e.g., \textfrac{31}{32} to get the simple fraction \(\frac{31}{32}\), and \textfrac{[2]{31}{32} to get \(2^{\frac{31}{32}}\). (The optional argument, 2 in the latter case, is always typeset in lining figures.)

• The \textsfrac macro, available only when you use the newtx package with option xcharter to load XCharter with newtxmath, allows you to write, e.g., \textsfrac{31}{32} to get
the simple stacked fraction \( \frac{31}{32} \), and \text{\textfrac{31}{32}} to get 2\( \frac{31}{32} \). (The optional argument, 2 in the latter case, is always typeset in lining figures.)

- \textcircled{} renders its argument in raised and reduced small caps encircled by the bigcircle glyph. E.g., \textcircled{M} and \textcircled{m} both render as \( \bigcirc \). The macro works also for numerals: \textcircled{2} renders as 2.

- \textth{} (and also \textthit{}) render their arguments using the theorem fonts. For example:
  \textth{Theorem font (01234):!} renders as Theorem font (01234):!—note the upright figures and punctuation. (There is no Bold theorem font—\textbf{\textth{Theorem font (01234):!}} renders as Theorem font (01234):!) The related font switch \thfamily{} is defined so that \{\thfamily A12!\} and \textth{A12!} are equivalent. In opentype processing, the StylisticSet 05 controls whether figures and punctuation are upright in italic shaped faces.

Math package choices:

There is now a unicode math package, XCharter-Math that may be run with a simple preamble containing

\begin{verbatim}
\usepackage[fontspec]
  \setmainfont{XCharter} % reads XCharter.fontspec
  \usepackage{unicode-math}
  \setmathfont{XCharter-Math.otf}
\end{verbatim}

or, even better, as described in the documentation for XCharter-Math,

\begin{verbatim}
\usepackage{xcharter-otf}
\end{verbatim}

but in order to get the options and macros described in this documentation, you should use instead, for the same effect

\begin{verbatim}
\usepackage[otfmath]{XCharter}
\% loads fontspec, unicode-math, and sets XCharter-Math.otf
\end{verbatim}

Notes on the last preamble fragment:

- Unless option otfmath is specified, math will be processed by newtxmath with xcharter option. (See examples 2–6 below.)
- All options passed to XCharter that are not understood by XCharter will be passed along to xcharter-otf provided option otfmath was specified.

Three non-unicode math packages seem to provide reasonable companions for XCharter. The first example uses Charter italics as math italics, but doesn’t provide arbitrary scaling and doesn’t sufficiently distinguish math italic v from mathematical Greek \( \nu \). Moreover, it is not easy to redefine \mathcal{} to get a better math calligraphic alphabet—e.g., the mathalpha package fails. The second uses libertine italics and Greek in math mode, which is a good match to Charter in style and weight after scaling up, is arbitrarily scalable, has distinct math italic v and mathematical Greek \( \nu \), and is completely compatible with mathalpha. The third is a new revision of newtxmath with option charter (or, equivalently, xcharter), which substitutes Charter italics
as math italics and, as of version 1.11, uses a newly developed family of Greek symbols in \{regular, bold\} \times \{upright, italic\} to match the style and italic angle of XCharter. This version is scalable and has a math italic v (plus a matching w) distinct from \nu. (The option noxchvw to newtxmath changes the v and w to be the original Charter italic glyphs, which may lead to issues with \nu.)

**Example 1:**

\[
% [pdf]latex only
\usepackage[charter,expert]{mathdesign}
\usepackage[scaled=.96,osf]{XCharter}\% matches the size used in math
\linespread{1.04}
\]

**Example 2:**

\[
% [pdf]latex only
\usepackage[scaled=.98,sups,osf]{XCharter}\% lining figures in math, osf in text
\usepackage[scaled=1.04,varqu,varl]{inconsolata}\% inconsolata typewriter
\usepackage[type1]{cabin}\% sans serif
\usepackage[uprightscript,libertine,mathscale=1.05]{newtxmath}
\linespread{1.04}
\]

**Example 3:**

\[
% [pdf]latex only
\usepackage[scaled=.98,sups,osf]{XCharter}\% lining figures in math, osf in text
\usepackage[scaled=1.04,varqu,varl]{inconsolata}\% inconsolata typewriter
\usepackage[type1]{cabin}\% sans serif
\usepackage[uprightscript,libertine,mathscale=1.05]{newtxmath}
\linespread{1.04}
\]

**Example 4:**

\[
% [pdf]latex only
\usepackage<specify babel languages>{babel}\% load before XCharter
\usepackage[scaled=.98,sups,osf]{XCharter}\% osf in text, lining figures in math
\usepackage[scaled=1.04,varqu,varl]{inconsolata}\% inconsolata typewriter
\usepackage[type1]{cabin}\% sans serif
\usepackage[uprightscript,libertine,mathscale=1.05]{newtxmath}
\linespread{1.04}
\]

**Example 5:**

\[
% an example using newtx.sty, works with all latex engines
\usepackage<specify babel languages>{babel}\% load before newtx
\usepackage[scaled=1.04,varqu,varl]{inconsolata}\% inconsolata tt
\usepackage[type1]{cabin}\% sans serif for math
\usepackage[T1]{fontenc} \% encoding to use for mathtt, etc
\usepackage[xcharter,osf,p,mathscale=1.05,textscale=0,uprightscript,mathscale=1.05]{newtxmath}\% load
% newtx loads fonts with unicode engines
\setmonofont{lmmono10-regular.otf}{[Scale=1.08] \% typewriter for text
\linespread{1.04}
% load polyglossia after newtx, if using
Here is a short sample based on the preamble of Example 3:

The typeset math below follows the ISO recommendations that only variables be set in italic. Note the use of upright shapes for \( d \), \( e \) and \( \pi \). (The first two are entered as \texttt{\textbackslash mathrm\{d\}} and \texttt{\textbackslash mathrm\{e\}}, and in fonts derived from \texttt{newtxmath} or \texttt{mtpro2}, the latter is entered as \texttt{\textbackslash uppi}.)

**Simplest form of the Central Limit Theorem:** Let \( X_1, X_2, \ldots \) be a sequence of iid random variables with mean \( 0 \) and variance \( 1 \) on a probability space \((\Omega, \mathcal{F}, \mathbb{P})\). Then

\[
\mathbb{P}\left(\frac{X_1 + \cdots + X_n}{\sqrt{n}} \leq y\right) \to \mathcal{N}(y) := \int_{-\infty}^{y} \frac{e^{-v^2/2}}{\sqrt{2\pi}} \, dv \quad \text{as } n \to \infty,
\]

or, equivalently, letting \( S_n := \sum_1^n X_k \),

\[
\mathbb{E}f\left(\frac{S_n}{\sqrt{n}}\right) \to \int_{-\infty}^{\infty} f(v) \frac{e^{-v^2/2}}{\sqrt{2\pi}} \, dv \quad \text{as } n \to \infty, \text{ for every } f \in bC(\mathbb{R}).
\]
2. **Text effects under fontaxes**

This package loads the fontaxes package in order to access italic and slanted small caps. You should pay attention to the fact that fontaxes modifies the behavior of some basic \LaTeX{} text macros such as \textsc{\textup{a}} and \textsc{\textbf{a}}. Under normal \LaTeX{}, some text effects are combined, so that, for example, \textsc{\textbf{\textit{a}}} produces bold italic \textsc{a}, while other effects are not, e.g., \textsc{\textit{a}} has the same effect as \textsc{\textbf{a}}, producing the letter \textsc{a} in upright, not small cap, style. With fontaxes, \textsc{\textit{a}} produces instead upright small cap \textsc{a}. It offers a macro \textsc{\textsc{\textup{a}}} that undoes small caps, so that, e.g., \textsc{\textsc{\textit{a}}} produces bold italic \textsc{a} in non-small cap mode, with whatever other style choices were in force, such as bold or italics.

3. **Text Companion Issues**

As of version 1.206, \textsc{XCharter} has essentially full support for \textsc{textcomp} and there should be no issues in using any of the macros like \textsc{\textregistered} and \textsc{\textinterrobang} (®, ⁉.)

\textsc{XCharter-Roman-ts1}
4 Usage with fontspec

Because the package supplies a file named XCharter.fontspec whose contents list the otf files that correspond to each of Regular, Bold, Italic, BoldItalic, Slanted and BoldSlanted, you may load XCharter with just

\usepackage{fontspec}
\setmainfont{XCharter}

With unicode-encoded text, you will, in particular, have complete access to the Cyrillic glyphs.

5 XCharter and PDF/A

There are a number of PDF/A validators available, though their outputs can and do differ when applied to the same document. I've tried the following.

- The free veraPDF validator is much stricter. Recent documents produced using XCharter since version 1.24 have validated correctly.
6 Using Cyrillic with pdflatex

The OT2 encoding, now considered as obsolete because it is 7-bit, is nonetheless useful to scholars who wish to write short segments using a Cyrillic script from a Western keyboard. There are two means of doing this, one using control sequences for the characters (e.g., \CYRA for Cyrillic A) and the other using ligatures to access the characters. Tables setting out the substitutions available may be consulted at http://herbert.the-little-red-haired-girl.org/dvi/pdf/cyrillic.pdf.

Note that, while the OT2 encoded font is complete, there are many gaps in the T2A encoded version, so that only Modern Russian and Ukrainian are fully covered, along with a number of characters from Old Russian and other Slavic languages.

XCHARTER-ROMAN-TLF-OT2.TFM:

<table>
<thead>
<tr>
<th>0x</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
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</tbody>
</table>

This encoding contains the upright Sha glyph in slot 88. This may be used in mathematical formulas by defining \def\Sha{\usefont{OT2}{XCharter-TLF}{m}{n}\char88} so that one may write \$\text{\Sha}(A/K)$ for the Tate–Shafarevich group Ш(А/К).

**Example OT2 Preamble:**

\documentclass{article}
\usepackage[OT2,T1]{fontenc} % loads ot2enc.def
\newcommand\cyrtext{|% declaration
\DeclareTextFontCommand\cyrtext{|%macro with argument

The Russian part of the following sentence is entered as \textcyr{а э1то --- по-русски}.

This is text in English, then Russian: а это — по-русски.
Using T2A with T1:

Here's an example of using XCharter text and math, set up to allow the use of Russian with English as the main language.

\usepackage[OT2,T2A,T1]{fontenc} % spell out all text encodings to be used
\usepackage[utf8]{inputenc} %
\usepackage[substitutefont]{substitutefont} % so we can use fonts other than those specified in babel
\usepackage[russian,english]{babel}
\usepackage[XCharter]{XCharter} %
\usepackage[charter,vvarbb,scaled=1.07]{newtxmath}
\useosf % use oldstyle figures except in math
\substitutefont{T2A}{\rmdefault}{XCharter} % use XCharter to render Russian
\substitutefont{OT2}{\rmdefault}{XCharter} % poor man's version

Any utf8-encoded text typed outside of a \foreignlanguage{}{} block will be rendered as T1-encoded XCharter, while that within \foreignlanguage{russian}{} will render as T2A-encoded Cyrillic.
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</table>
XCharter-Italic-tlf-t2a.tfm:

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<td>'V258'</td>
<td>'W259'</td>
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<td>'Y249'</td>
<td>'Z250'</td>
<td>'#251'</td>
<td>'$252$'</td>
<td>'%'253'</td>
<td>'&amp;254'</td>
<td>'#255'</td>
</tr>
</tbody>
</table>

Note: Currently, the XCharter encoding scheme for T2A covers only the figure styles lining, oldstyle and superiors.
7 Serbian Cyrillic

Serbian and Russian Cyrillic differ in the following ways.

<table>
<thead>
<tr>
<th>Character</th>
<th>Shape</th>
<th>Russian</th>
<th>Serbian</th>
</tr>
</thead>
<tbody>
<tr>
<td>U+0431</td>
<td>Upright</td>
<td>б</td>
<td>б</td>
</tr>
<tr>
<td>U+0431</td>
<td>Italic</td>
<td>в</td>
<td>в</td>
</tr>
<tr>
<td>U+0433</td>
<td>Italic</td>
<td>г</td>
<td>г</td>
</tr>
<tr>
<td>U+0434</td>
<td>Italic</td>
<td>д</td>
<td>д</td>
</tr>
<tr>
<td>U+043F</td>
<td>Italic</td>
<td>п</td>
<td>п</td>
</tr>
<tr>
<td>U+0442</td>
<td>Italic</td>
<td>т</td>
<td>т</td>
</tr>
</tbody>
</table>

Usage under XeLaTeX and XeLaTeX is simple. Your preamble should include

\usepackage{polyglossia}
\usepackage{fontspec}
\setmainfont{XCharter}[^%
Language=Serbian,
Script=Cyrillic
]

Then all (unicode) input characters will be typeset using the above substitution table.

The story is a bit more complicated with \LaTeX processing.

**Example 1: Serbian Cyrillic as default text.**

\usepackage[utf8x]{inputenc}
\usepackage[serbianc]{babel}
\usepackage[serbianc]{XCharter}
\usepackage[T2A]{fontenc}

This will produce essentially the same output as the \fontspec example above, with unicode input.

It may be be possible to work out a scheme that would allow multiple scripts and languages to be used with \serbianc as the main or as a secondary language in \babel, but I have not succeeded in doing this with XCharter, and know of no other example that I might crib from.

**Opentype processing and German orthography**

Prior to version 1.12, XCharter offered only basic support for German orthography, having all required accented glyphs and the lower case Ь, as well as a small caps Ь. Under non-unicode \LaTeX, the T1 encoding contained S_S. With unicode \tex processing:

{\addfontfeature{StylisticSet=1}\ss \textsc{\ss}}

typesets, as in non-unicode \LaTeX processing, to

Ь Ь

Note also that in unicode processing, in order to obtain the expected case change behavior, it may be necessary to add in your preamble:
\uccode`ẞ="1E9E

As of version 1.12 of XCharter, there are now glyphs in each style for U+1E9E and for its small caps version, accessible under unicode TeX. The glyphs may be used as the uppercase and small caps versions of \textsc{germandbls}. Currently, the new glyphs are not available in any of the LaTeX encodings and must be used via unicode TeX.

The following tables show how to access the new glyphs in unicode TeX. Note that you will need to set StylisticSet=1 if you wish not to use the new sharp-s glyphs.

**New symbols in XCharter:**

<table>
<thead>
<tr>
<th>Glyph name</th>
<th>glyph</th>
<th>macro</th>
</tr>
</thead>
<tbody>
<tr>
<td>uni1E9E</td>
<td>ß</td>
<td>\symbol{&quot;1E9E}</td>
</tr>
<tr>
<td>uni1E9E.ss01</td>
<td>SS</td>
<td>{\addfontfeature{StylisticSet=1}\symbol{&quot;1E9E}}</td>
</tr>
<tr>
<td>germandbls.sc</td>
<td>ß</td>
<td>\textsc{\ss}</td>
</tr>
<tr>
<td>germandbls.sc.ss01</td>
<td>ss</td>
<td>{\addfontfeature{StylisticSet=1}\textsc{\ss}}</td>
</tr>
</tbody>
</table>

**Effect of choice of StylisticSet:**

<table>
<thead>
<tr>
<th>StylisticSet</th>
<th>\ss</th>
<th>\SS</th>
<th>\MakeUppercase{\ss}</th>
<th>\textsc{\ss}</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>ß</td>
<td>ß</td>
<td>ß</td>
<td>ß</td>
</tr>
<tr>
<td>=1</td>
<td>ß</td>
<td>SS</td>
<td>SS</td>
<td>ss</td>
</tr>
</tbody>
</table>

**Choosing the shape of the oldstyle figure “one”:**

The default is 1. The choice is controlled by the feature cv01. To change this globally when you load XCharter, you may make oldstyle numbers the default with the alternate shape for “one”:

\setmainfont{XCharter}[CharacterVariant={1:0},Numbers={OldStyle}]  

To set this for one-time use, you can write:

{\addfontfeature{CharacterVariant={1:0},Numbers={OldStyle}}1}

to make 1 render as 1. (According to its documentation, the first index 1 in \{1:0\} refers to the CharacterVariant index, and the second index, 0, refers to the first choice specified among the variant forms.)

If you choose to load XCharter-*.otf using XCharter.sty or newtx, you may make use of the options osf, osfI or the macros \useosf, \useosfI to the same effect.