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Go Fetch, Stock Rover

By **MIKE HOGAN** | [MORE ARTICLES BY AUTHOR](#)

Impressive new equities Website is an able portfolio manager and likely a tough competitor to Wikinvest.

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If you stumble across Stock Rover's landing page in your Internet travels, you might be inclined to move on: It looks like every other airy, Web 2.0 social-media site—complete with a warm-puppy logo. But if you skip the free registration and don't log in, you'll miss the "Wow!" moment I enjoyed.

No Website I've seen packs so much useful, context-appropriate information onto a single page. Lots of sites are crammed with disconnected bric-a-brac that tries to lure you into clicking on something—anything. Rover's ([stockrover.com](#)) dashboard/portfolio page is packed with information that's not only valuable, but relevant, too.

Wikinvest ([wikinvest.com](#)) is the only other stock dashboard/portfolio manager that successfully combines anything close to this functionality with such ease of use. Another site, Personal Capital ([personalcapital.com](#)), has a very good dashboard, but offers a more wide-ranging perspective encompassing a variety of asset types for your larger personal-finance "portfolio." It's more akin to Quicken software's home view ([intuit.com](#)).

ROVER IS A FOCUSED stock-trading tool still in beta. It isn't as roomy and welcoming as Wikinvest, mostly because of a smaller typeface necessitated by its data density. But unlike the fairly static views on most financial analysis sites, Rover is infinitely customizable, easily topping your next best option. Move over, Wikinvest, there's a new big dog on the stock-research porch.

It starts with Rover's dashboard, the centerpiece of which is a very spreadsheet-like portfolio manager. Its column-and-row matrix offers granularity and flexibility that surpass even Quicken's portfolio view, on the way toward something comparable to Microsoft Excel. Resize, reorder, add, remove and sort Rover's columns; you can train this portfolio to behave any way you like. This is as good as it gets on the Web—at least in a retail tool.

And information is stacked in a third dimension, too. Place the mouse over a ticker or fund name, and up pops a fly-over thumbnail of key characteristics—say, **PowerShares QQQ Trust's** (ticker: QQQ) 0.95 beta. Okay, that's an easy one, but you might have to check three or four sites to find up-to-date betas for most tickers, even for large-caps.

Rover's data are continuously updated, and extend to very lightly traded small-caps like the \$162 million **iShares Morningstar Small Value Index** Fund (JKL).

Rover's exhaustive filtering and screening includes 11 preconfigured views of as many portfolios and watch lists as you can fit on a screen. Each includes a battery of metrics commonly associated with a portfolio perspective—one focused on returns, another for



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valuation data, and so forth. Clicking among the views changes the portfolio's data columns to different combinations of some 250 stock parameters.

These views also can be applied to the constituents of several popular stock indexes – the Dow Jones Industrial Average, S&P 500, S&P 100, Nasdaq 100 – 11 commonly-used market sectors and their industries, or any of seven major classes of 900-plus exchange-traded funds.

So, for example, at the click of a mouse, you can view a portfolio of the Dow's 30 holdings or any of 178 diversified domestic ETFs that can then be broken down by asset class or industry.

Are you kidding me? The volume of information being fetched in near-real time is incredible, and available in few places that don't charge institution-sized subscription rates.

Many of Rover's numbers are the results of custom calculations that produce unique information you can't find on Yahoo!, Google or Thomson Reuters. For example, choose a return date-range from one day to five years, or display the annual amount of cash you can expect from each ticker's regular dividend. The latter will endear the dog to income-hungry investors who realize that total return, not just share appreciation, matters.

The portfolio sits atop a highly interactive price/volume chart, where you can plot the histories of multiple tickers against popular benchmarks. You can overlay both common fundamental and technical indicators—splits, earnings, and dividends as well as moving averages and Bollinger bands.

Granted, it's a basic collection of technical indicators. On the other hand, it would take a dedicated charting application to meet the needs of true technicians, says co-founder and CEO Howard Reisman, a long-time investor and software engineer who grew frustrated with existing portfolio systems and constant shifts among different windows. Rover's indicators are those that even fundamental investors often use. You can, for instance, plot the nine SPDR ETF market-sector proxies against the S&P500, and, in a couple of mouse clicks, follow investors' rotation into and out of different sectors over a variety of time periods.

THE OTHER MAJOR component of the dashboard is a sidebar whose tabs provide information about the ticker being highlighted in the portfolio manager. Besides the standard intraday market data, there's a summary of the ticker's peers, the latest analyst estimates, and a real-time news feed that, once again, is entirely coordinated with other elements. You can even make notes linked to a ticker—the first time I've seen this capability. Notes can be dated and sorted alphabetically or by date.

Highlight a different ticker, and all these elements change before your finger rebounds from the mouse click. Charts and sidebars are easily toggled on and off to make room for lengthier portfolio views; and every panel can be resized just by dragging its border.

One thing Rover doesn't do that Wikipinvest does is fetch holdings from your brokerage accounts so they can be continuously, automatically updated. That's on the to-do list, says Reisman. Currently free for anyone who registers, the site will be in beta until year-end, when a reasonably priced professional version will be offered.

Far from fully grown, Rover already demonstrates what can happen when people who know the market, such as Reisman and Chief Technology Officer Andrew Martin, wield Web 2.0 tools. Rover goes beyond the usualsocial-media platitudes to deliver real bred-in-the-bone functionality. Good boy.

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— robert marischen
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