

# *Getting Set Up on Stock Rover*

July 8, 2014



# *Agenda*

- Slides
  - Live demo
  - Questions
- 
- Download slides & task list (recommended) at [www.stockrover.com/webinar-outline.html](http://www.stockrover.com/webinar-outline.html)

# Goals

- Teach you the main concepts of Stock Rover
- Show you a few neat tricks
- Give you a sense of what's possible in the program
- Point out resources you can use to help you in the future

# *Who uses Stock Rover?*

- Investors of all levels
  - Streamline your research
  - Analyze your portfolios
  - Become a more educated investor

# *What can I research?*

- We specialize in stocks on North American exchanges and ETFs
- Mutual funds priced but we do not have additional data
- Options not yet supported
- Tickers can be added to the database by users
  - Data may be limited

# Panels

Portfolio Reporting Library Options Videos Help Search www.stockrover.com Welcome Get-Set-Up to Stock Rover Premium Invite a Friend Feedback Logout

**Task Wizard**

**I would like to...**

- Research Stocks
- Screen for Stocks
- Create a Portfolio
- Modify a Portfolio
- Create a Watchlist
- Modify a Watchlist
- Change Table Columns
- Filter the Table

**Navigation**

- The Research Box
- My Portfolios
- My Watchlists
- My Screeners
- Indices
  - DJIA
  - S&P 100
  - S&P 500
  - Nasdaq 100
- Sectors
- ETFs

**Tickers within Index "DJIA" (30 rows)**

Profile Portfolio Performance **Current Returns** Historical Returns Returns vs. S&P 500 Historical Valuation Momentum Valuation

Ticker	Company	Last Close	Price	Daily Price Range		Price Change (\$)	Price Change (%)	52-wk Range		Price wk Hi
AXP	American Express	\$95.84	\$95.40	\$95.12	\$95.66	-\$0.44	-0.46%	\$71.47	\$96.24	
BA	Boeing	\$128.51	\$129.09	\$127.77	\$129.50	\$0.58	0.45%	\$98.99	\$144.57	
CAT	Caterpillar	\$111.08	\$110.16	\$109.57	\$110.45	-\$0.92	-0.83%	\$81.35	\$111.16	
CSCO	Cisco Systems	\$25.19	\$25.23	\$24.97	\$25.25	\$0.04	0.16%	\$20.22	\$26.49	
CVX	Chevron	\$131.19	\$130.47	\$130.02	\$130.64	-\$0.72	-0.55%	\$109.27	\$133.57	
DD	E I du Pont de Nemours	\$65.80	\$65.64	\$65.10	\$65.75	-\$0.16	-0.24%	\$52.40	\$69.75	
DIS	Walt Disney	\$86.84	\$86.59	\$86.32	\$86.82	-\$0.25	-0.29%	\$60.41	\$86.98	
GE	General Electric	\$26.86	\$26.75	\$26.68	\$26.84	-\$0.11	-0.41%	\$22.91	\$28.09	
GS	Goldman Sachs Group	\$169.46	\$167.78	\$166.90	\$168.97	-\$1.68	-0.99%	\$150.43	\$181.13	
HD	Home Depot	\$82.05	\$81.42	\$81.14	\$82.09	-\$0.63	-0.77%	\$72.21	\$83.20	
IBM	IBM	\$188.53	\$188.04	\$187.44	\$188.27	-\$0.49	-0.26%	\$172.19	\$200.94	
INTC	Intel	\$31.14	\$31.03	\$30.92	\$31.20	-\$0.11	-0.35%	\$21.89	\$31.36	

**Chart for AXP (American Express)**

AXP Price Jul 7, 2014 AXP 95.40

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul

1 Day 2 Days 5 Days 10 Days 1 Month 3 Month 6 Month 1 Year 2 Year 5 Year 10 Year More... Start 07/05/13 End 07/07/14

**Insight for AXP (American Express)**

Summary Detail News Peers Links Notes

Modify Links

**Research Links for American Express**

- Barron's Insider Transactions
- Barron's Stock Quote
- FinViz Stock Quote
- Google Finance Stock Quote
- Market Watch Options Quote
- MorningStar Analyst Report
- MorningStar Executive Compensation
- MorningStar Financials
- MorningStar Key Ratios
- MorningStar Stock Valuation
- Seeking Alpha Transcripts
- StockCharts Chart
- Yahoo Dividend History
- Yahoo Industry Comparison
- Yahoo Stock Quote

https://www.stockrover.com/sr/#

# Navigation Panel populates the Table

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**Navigation**

- 📁 The Research Box
  - ▶ My Portfolios
  - ▶ My Watchlists
  - ▶ My Screeners
  - ▶ Indices
    - 📄 DJIA
    - 📄 S&P 100
    - 📄 S&P 500
    - 📄 Nasdaq 100
  - ▶ Sectors
  - ▶ ETFs

**Tickers within Index "DJIA" (30 rows)**

Profile Portfolio Performance **Current Returns** Historical Returns Returns vs. S&P 500 Historical Valuation Momentum Valuation

Add Column Filter Save Print

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**Chart for AXP (American Express)**

AXP Benchmarks Events Technicals Fundamentals Settings Clear Shortcuts

# Selected Table row populates Chart (if linked) & Insight panel

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**Chart for AXP (American Express)**

AXP | Benchmarks | Events | Technicals | Fundamentals | Settings | Clear | Shortcuts

Price Jul 7, 2014  
AXP 95.40

**Insight for AXP (American Express)**

Summary Detail News Peers Links Notes

Market Summary as of Mon 4:21pm

Index	Value	Change	% Change
DJIA	17,024.21	-44.05	-0.26%
S&P 500	1,977.65	-7.79	-0.39%
S&P 100	875.87	-2.27	-0.26%
Nasdaq 100	3,910.71	-12.30	-0.31%

**AXP American Express**

Price as of Mon 4:02pm \$95.40 -0.44 (-0.46%)

Cap \$101,284M  
Short % of Float 0.9%  
Employees 62,800  
Industry Credit Services  
Sector Financial Services  
Ex-Dividend Date 07/09/14  
Last Reported Quarter 03/31/14

Growth Grade **C**  
Profitability Grade **C**  
Financial Health Grade **B**

Address 200 Vesey Street, New York, NY, USA, 10285  
Home Page [AXP](#)

American Express Co was founded in 1850 as a joint stock association and was incorporated in 1965 as a New York corporation.

American Express together with its subsidiaries is a service company that provides customers with access to products, insights and experiences that enrich lives and build business success.

Its main products and services are charge and credit payment card products and travel...[More](#)

Ownership and Officers



# Selecting a parent item in the Navigation panel

**Task Wizard**

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**Navigation**

- The Research Box
- My Portfolios
  - Warren Buffett Top 25
  - Bill Gates Like
  - John Wasik Nano Lazy Portfolio
  - Yale University Unconventional
- My Watchlists
- My Screeners
- Indices
- Sectors
  - Basic Materials (3607)
  - Communication Services (392)
  - Consumer Cyclical (1952)
  - Consumer Defensive (936)
  - Energy (1576)
  - Financial Services (2569)
  - Healthcare (1510)
  - Industrials (2789)
  - Real Estate (770)
  - Technology (2045)
  - Utilities (409)
- ETFs
  - Alternative (332)
  - Balanced (40)
  - Bond Municipal (30)
  - Bond Taxable (176)
  - Commodities (115)
  - Domestic Diversified (244)
  - Domestic Specialty (283)

Recycle Bin (Empty)

**Portfolios (4 rows)**

Profile | **Portfolio Performance** | Current Returns | Historical Returns | Returns vs. S&P 500 | Historical Valuation | Momentum | Valuation

Type Tickers to Research here

Name	Return (3 Years)	Gain 1-Day	52-wk Range	Quantity	Buy Price	Price	Value
Warren Buffett T...	56.7%	-\$459,298	\$66.52 - \$84.74	1,560,349	\$54.69	\$82.08	\$100,452,414
<b>Bill Gates Like</b>	51.7%	-\$86,830	\$85.10 - \$105.64	234,168	\$75.83	\$102.92	\$20,228,016
Yale University ...	29.1%	-\$702	\$25.16 - \$29.39	57,911	\$17.27	\$29.05	\$1,177,093
John Wasik Nan...	25.5%	-\$2,075	\$71.90 - \$82.92	23,231	\$43.05	\$81.87	\$1,143,409
<b>Summary</b>	55.2%	-\$548,905		1,875,659	\$56.03	-	\$123,000,933

**Chart for Bill Gates Like**

Bill Gates Like | Price Jul 7, 2014 | Bill Gates Like 115.31

1 Day | 2 Day | 5 Day | 10 Day | 1 Month | 3 Month | 6 Month | **1 Year** | 2 Year | 5 Year | 10 Year | More... | Start 07/05/13 | End 07/07/14

**Insight for Portfolio "Bill Gates Like"**

Summary | Detail | News | Peers | Links | Notes

**Market Summary as of Mon 4:21pm**

DJIA	17,024.21	-44.05	-0.26%
S&P 500	1,977.65	-7.79	-0.39%
S&P 100	875.87	-2.27	-0.26%
Nasdaq 100	3,910.71	-12.30	-0.31%

**Bill Gates Like**

Price Change: -\$0.47 (-0.43%)  
 YTD Return: 7.9%  
 YTD Return vs S&P 500: -0.2%  
 Beta 1-Year: 0.89

Bill and Melinda Gates Foundation Trust Holdings as of June 30th, 2013. Note the portfolio share counts are divided by 1000 vs. the actual share counts to keep the sample portfolio in the millions rather than the billions.

**Portfolio Allocation**

Equity Types > Stock

Basic Materials	\$481,482	(2.4%)
Communication Services	\$488,386	(2.4%)
Consumer Cyclical	\$1,722,139	(8.5%)
Consumer Defensive	\$3,129,745	(15.5%)
Energy	\$1,159,995	(5.7%)
<b>Financial Services</b>	<b>\$9,598,574</b>	<b>(47.5%)</b>
Industrials	\$3,647,694	(18.0%)

# Tooltips

- Tooltips add another dimension of information
  - they can save you time
- If you see a tooltip, stop to check it out!
- Different types of tooltips can be turned on/off through Options > Tooltips

The screenshot shows a dropdown menu with the following items: Warren Buffett T..., Bill Gates Like, Yale University..., John Wasik, and Summary. A tooltip is displayed over the 'John Wasik' item, showing the following data:

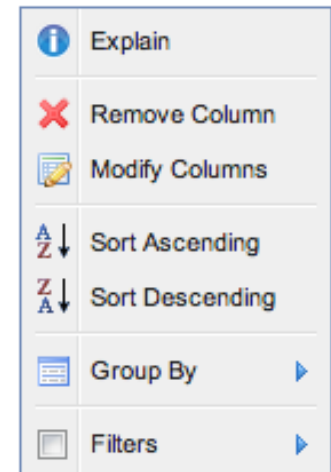
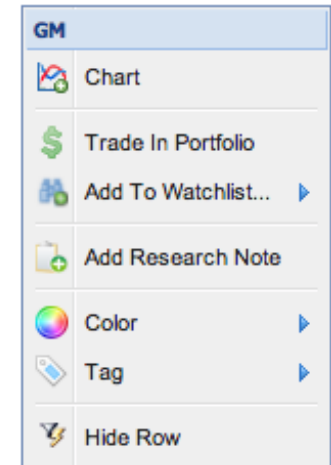
John Wasik Nano Lazy Portfolio	
1-Day Return	0.4%
Gain 1-Day	\$4,292
Value	\$1,068,283
Basis	\$1,000,000
Gain (%)	6.8%
Gain (\$)	\$68,283
Price / Earnings	-
Beta 1-Year	0.61



CSX	CSX	C	12,027	0.2%		\$			
EJPRF	East Japan R...	C	27,292			\$			
RAI	FreightCar Am...	C	327	1.2%		\$			
GBX	<b>RAIL (FreightCar America) Summary</b>					1,832	2.0%		\$
GSH	Price	\$24.50	2,505	-1.4%		\$			
KSU	Cap	\$297M	2,370	1.0%		\$			
PRRR	Employees	918	18			\$			
PWX	Growth Grade	C	31	-4.1%		\$			
TOKU	Profitability Grade	C	11,052			\$			
TOKU	Financial Health Grade	C	11,052			\$			
WJRY	FreightCar America, Inc., is incorporated in Delaware. The Company is a manufacturer of aluminum-bodied railcars in North America, based on the number of railcars delivered. It specializes in the production of coal cars, which represented 91% of its deliveries of railcars in 2012 and 93% of its deliveries of railcars in 2011. It designs and manufactures aluminum-bodied and steel-bodied railcars th...					13,270	-1.2%		\$
BTSGF	Price	\$24.50	286	9.8%		\$			
CJPRF	Cap	\$297M	16,485			\$1			
CJPRY	Employees	918	16,485	-1.6%		\$			
DAKP	Growth Grade	C	0	1.4%		\$			

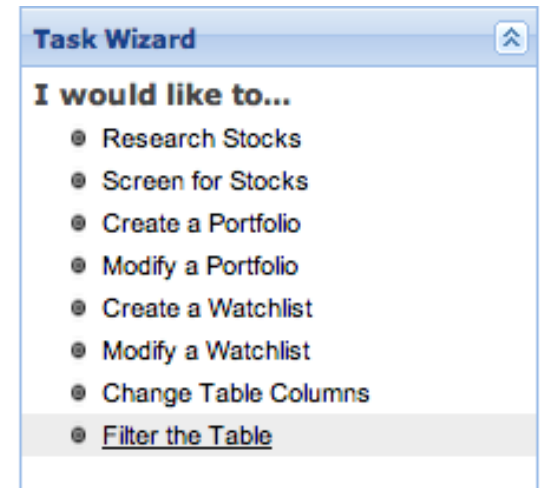
# Right-Click/Drop-Down Menus

- Right-click menus are your friend
- Use these menus to:
  - Import a portfolio
  - Color or hide a row in the table
  - Group the table by sector or industry
  - Edit table columns
  - Chart a portfolio, screener, or watchlist
  - and much more



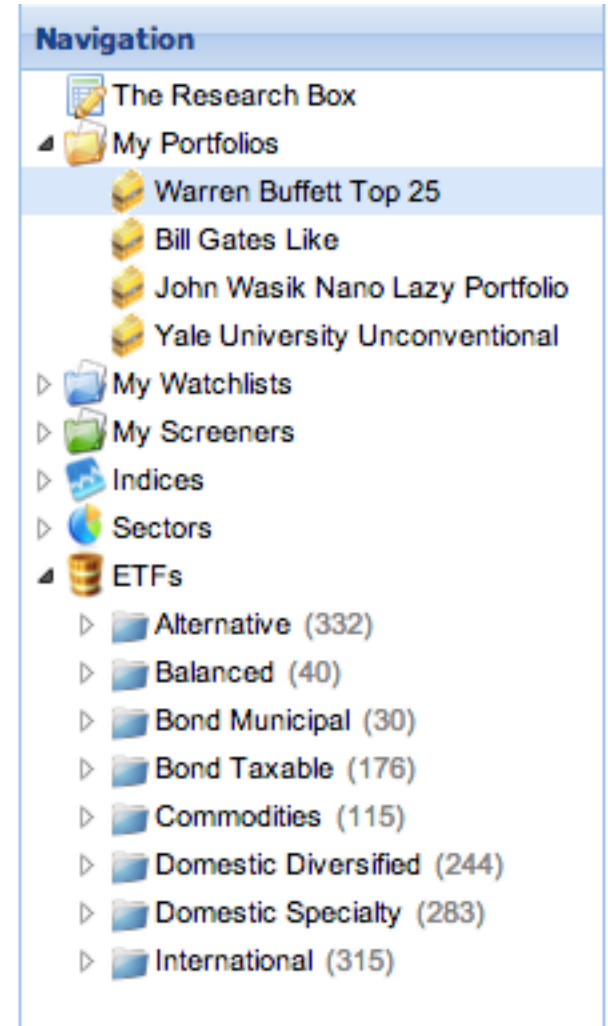
# Task Wizard

- Different wizards to guide you through key tasks, such as:
  - filtering data in the Table
  - screening for stocks
  - creating a portfolio or watchlist
  - modifying the Table's columns



# Navigation Panel

- Populates Table
- Contains user-defined items such as portfolios and screeners, as well as indices, sectors, & ETFs
- Right-click any item for a menu of options



# *The Table*

- A spreadsheet of financial data
- Columns are organized into “views”
- Views are customizable – add, re-order, and remove columns
- Sort, filter, & group data
- Save as a watchlist
- Export tables (Premium)

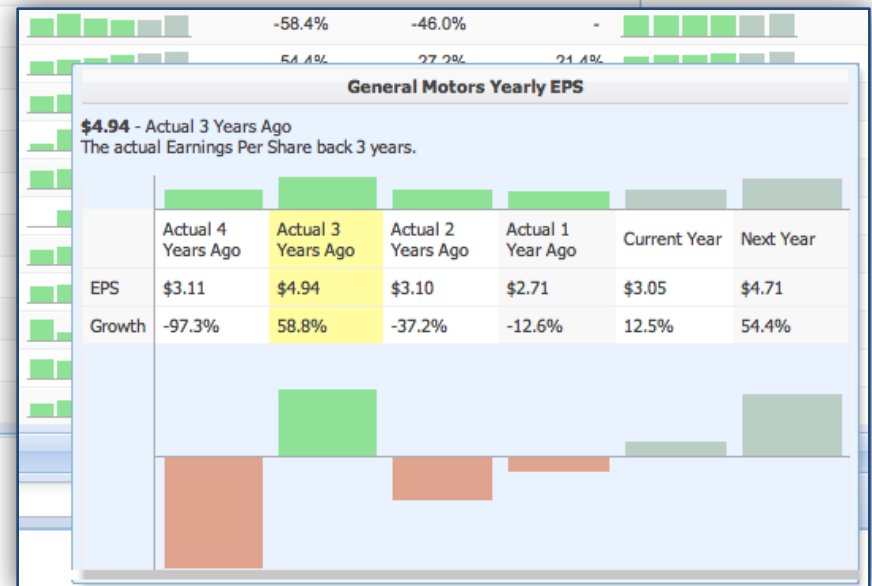
# The Table

Tickers within Portfolio "Warren Buffett Top 25" (24 rows)

← Rent Returns | Historical Returns | Returns vs. S&P 500 | Historical Valuation | Momentum | Valuation | Dividends | Profitability | **Growth** →

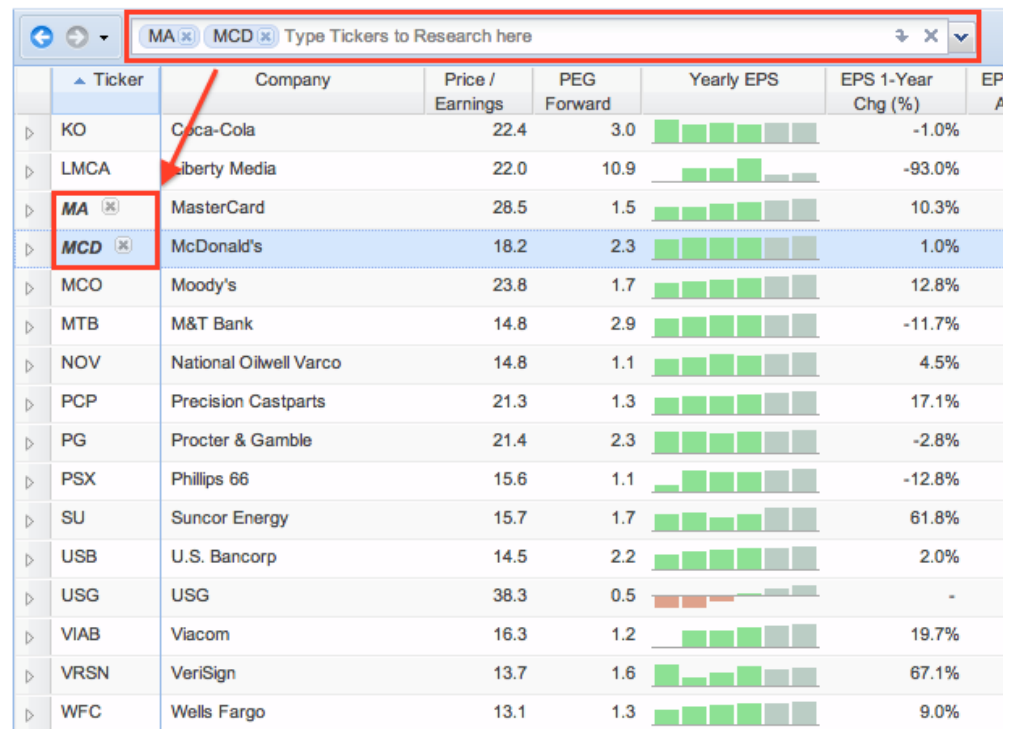
↶ ↷ | [Search] | Add Column | Filter | Save | Print

Ticker	Company	Price / Earnings	▲ PEG Forward	Yearly EPS	EPS 1-Year Chg (%)	EPS 3-Year Avg (%)	EPS 5-Year Avg (%)	Yearly Sales
USG	USG	38.3	0.5		-	-	-	
GM	General Motors	21.3	0.6		-58.4%	-46.1%	-	
CBI	Chicago Brdge & Iron	14.7	0.9		54.4%	27.3%	21.4%	
NOV	National Oilwell Varco	14.8	1.1		4.5%	11.2%	5.2%	
PSX	Phillips 66	15.6	1.1		-12.8%	-	-	
IBM	IBM	12.9	1.2		3.8%	5.9%	9.4%	
VIAB	Viacom	16.3	1.2					
WFC	Wells Fargo	13.1	1.3					
PCP	Precision Castparts	21.3	1.3					
VRSN	VeriSign	13.7	1.6					
BK	Bank of New York Mellon	14.6	1.6					
DTV	Directv	16.9	1.7					
DVA	DaVita HealthCare	20.0	1.7					
SU	Suncor Energy	15.7	1.7					
MCO	Moody's	23.8	1.7					
WMT	Wal-Mart Stores	15.9	1.8					



# The Research Box

- Compare a ticker to any dataset
- When you switch datasets, the research tickers remain
- To remove them, click their 'x'



Ticker	Company	Price / Earnings	PEG Forward	Yearly EPS	EPS 1-Year Chg (%)	EP
KO	Coca-Cola	22.4	3.0		-1.0%	
LMCA	Liberty Media	22.0	10.9		-93.0%	
MA	MasterCard	28.5	1.5		10.3%	
MCD	McDonald's	18.2	2.3		1.0%	
MCO	Moody's	23.8	1.7		12.8%	
MTB	M&T Bank	14.8	2.9		-11.7%	
NOV	National Oilwell Varco	14.8	1.1		4.5%	
PCP	Precision Castparts	21.3	1.3		17.1%	
PG	Procter & Gamble	21.4	2.3		-2.8%	
PSX	Phillips 66	15.6	1.1		-12.8%	
SU	Suncor Energy	15.7	1.7		61.8%	
USB	U.S. Bancorp	14.5	2.2		2.0%	
USG	USG	38.3	0.5		-	
VIAB	Viacom	16.3	1.2		19.7%	
VRSN	VeriSign	13.7	1.6		67.1%	
WFC	Wells Fargo	13.1	1.3		9.0%	



# The Chart



# *The Chart*

- Chart anything against anything
- Set a baseline (i.e. see relative performance)
- Add events like earnings reports & splits
- Add technicals like volume & SMA
- Add fundamentals like P/E and debt/equity
- See candlesticks or price logarithmic
- Include dividends

# The Insight Panel

- Current market status
- Key stats about a stock
- Links to homepage, earnings reports, outside research sites
- Industry peers
- News feed
- Your notes (Premium)

Insight for LMCA (Liberty Media)

Summary Detail News Peers Links Notes

Market Summary as of Mon 4:21pm

DJIA	17,024.21	-44.05	-0.26%
S&P 500	1,977.65	-7.79	-0.39%
S&P 100	875.87	-2.27	-0.26%
Nasdaq 100	3,910.71	-12.30	-0.31%

LMCA Liberty Media

Price as of Mon 4:00pm \$137.70 -1.55 (-1.11%)

Cap \$15,779M

Short % of Float 1.2%

Employees 3,893

Industry Broadcasting - TV

Sector Consumer Cyclical

Ex-Dividend Date 03/04/08

Last Reported Quarter 03/31/14

Growth Grade **C**

Profitability Grade **C**

Financial Health Grade **B**

Address 12300 Liberty Boulevard, Englewood, CO, USA, 80112

Home Page [LMCA](#)

Liberty Media Corporation is engaged in media, communications and entertainment industries.

Through its subsidiaries and affiliates, it operates in North America.

Ownership and Officers

Major Holders [Insider Transactions](#) [Officers](#)

Filings

[Annual Reports](#) [Quarterly Reports](#) [Other Forms](#)

Performance

Valuation

Profitability

	Stock	Industry	S&P 500
Gross Margin	65.8%	59.4%	43.6%
Operating Margin	19.5%	19.6%	20.3%
Net Margin	18.0%	10.6%	14.0%

Growth

	Stock	Industry	S&P 500
Sales 1-Year Chg (%)	65.8%	30.3%	-2.9%

Insight for LMCA (Liberty Media)

Summary Detail News Peers Links Notes

Gross Margin	65.8%	59.4%	43.6%
Operating Margin	19.5%	19.6%	20.3%
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Growth

	Stock	Industry	S&P 500
Sales 1-Year Chg (%)	65.8%	30.3%	-2.9%
Sales 3-Year Avg (%)	-	30.1%	0.4%
Operating Income 1	89.9%	79.1%	3.9%
Operating Income 3	-	3.0%	2.4%
EPS 1-Year Chg (%)	-93.0%	-92.6%	8.1%
EPS 3-Year Avg (%)	-	1.0%	6.6%

Portfolio Allocation [Print](#)

LMCA is 0.8% of Warren Buffett Top 25 (Consumer Cyclical)

Equity Types > Stock

Equity Type	Value	Percentage
Basic Materials	\$499,356	(0.5%)
Communication Services	\$3,200,804	(3.2%)
Consumer Cyclical	\$2,935,612	(2.9%)
Consumer Defensive	\$25,339,704	(25.2%)
Energy	\$5,757,777	(5.7%)
Financial Services	\$43,782,042	(43.6%)
Healthcare	\$2,194,589	(2.2%)
Industrials	\$3,392,268	(3.4%)
Technology	\$13,350,261	(13.3%)

# Toolbar

- Portfolio Reporting (Premium)
  - performance, risk metrics, correlation, & more
- Library
  - download portfolios, screeners, & more for FREE
- Options
  - preferences & account settings
- Stock Rover links
- Invite a Friend
- Feedback
  - the best way to get in touch with us
- Logout
  - saves your state for your next login

# Tablet App

- Access by logging into Stock Rover from the browser in your tablet
  - V4.4 update not yet available in Apple Store



- Mobile phone app? Coming soon!

# *Help Resources*

- Videos
  - Recorded webinars (Youtube)
- How-To Guide
  - When you click a ‘?’ in Stock Rover it will take you to the relevant help pages
- New User Guide
- Support pages
- Metric definitions

# *Task List*

- List of tasks to complete, such as
  - charting a portfolio
  - finding analyst estimates
  - modifying table columns
- This is what we gave to our interns to help them get oriented – it worked!
  - “very helpful”
- [www.stockrover.com/webinar-outline.html](http://www.stockrover.com/webinar-outline.html)