

# Guide to Using Stock Rover in the Classroom

Stock Rover offers a comprehensive platform for investment research that is ideal for use in a university classroom. This guide goes over the advantages of using Stock Rover as a teaching tool, and lists features that instructors may find particularly useful.

## Benefits to using Stock Rover as a teaching tool:

- **No program download** - Stock Rover is web-based, so students can access their account from their laptops, tablets, or library computers.
- **Shareable files** - Portfolios, watchlists, and screeners constructed in Stock Rover can be exported, shared via email, and then imported into any account, making it easy to:
  - Distribute Stock Rover materials, such as pre-constructed screeners or watchlists, to students
  - Have students submit assignments, such as portfolios, watchlists or screeners, to the professor
  - Share files among students who are working in groups
- **Free access to Stock Rover Premium** - For the duration of your class, you and your students can access the best of Stock Rover completely free. Details [here](#).
- **Robust free version** - The Stock Rover Basic subscription is free, so your students can continue to use it after your course and when they are beyond the reach of expensive university tools
  - For students who wish to continue using the Premium version, the subscription is also affordable for less than \$15/month with the student discount.
- **Online support** - We offer extensive online support, including [help documentation](#), [video tutorials](#), [webinars](#), and [blog posts](#) that not only teach users how to use the program, but also about the investment research process.

## Useful Features for Teaching Finance and Investing

Stock Rover is full of features that support a range of investing levels and styles. Below we've listed just a few that we thought would be particularly useful in a classroom context.

### Interactive Charting

The chart is a user-friendly tool for demonstrating financial concepts like moving averages, candlesticks, and relative performance. A host of fundamentals be charted for any stock, as well as dividends and events, such as the maximum drawdown. In addition to stocks, the chart can also compare sectors, industries, portfolios, watchlists, and screeners. [See a demo of the chart](#).

### Table Views

The Table is like a dynamic spreadsheet of stock data, and its different "view" tabs contain different sets of data columns. A view can be used to group together related metrics in order to teach specific investment concepts such as growth, profitability, efficiency, and more. Or, you can construct custom views for any given investing question—the possibilities are endless! Views can be exported and shared. [Learn more about Stock Rover's views](#).

### Watchlists

Watchlists let you save a list of stocks for analysis. It's easy to add, remove, and compare the stocks in the list, so students can learn to not only assess an individual stock, but also view it in the context of competing stocks. [See the help pages here](#).

### Risk Measures

Stock Rover offers a multitude of risk analytics that can help students take abstract concepts and put them into action. [Portfolio Reporting](#) has a "Risk and Reward" tab to help determine if a portfolio's returns are reasonable for the level of risk. We also offer advanced analytics such as

the beta, volatility, risk-adjusted return, Sharpe ratio, and the maximum drawdown. Additionally, with the [Portfolio Modeling facility](#), students can test potential trades and then instantly see how that trade would affect a portfolio's composition with regards to risk, returns, dividend yield, valuation metrics and sector allocation so they will get a hands-on understanding of how to construct a portfolio across multiple factors.

### **Fantasy Portfolio Tracking**

Students can keep fantasy portfolios to put their new knowledge to the test, without the risk of losing money. The fantasy portfolios include trading history and can be exported and submitted into the instructor's master account. There, they can be compared in the Table, Chart, and in our detailed Portfolio Reporting window to see which students are the most active, which are doing the best, which are improving, etc. By utilizing our portfolio analytics you can see if a portfolio's performance was accomplished with needless risk or skilled stock picking. [Learn more about portfolios in Stock Rover.](#)

### **Screeners**

Your students can construct innumerable variations of screeners in order to find certain types of stocks. In addition to offering over 275 categorized, screenable criteria, Stock Rover gives a definition and benchmark values for all metrics, so students can have a jumping off point when they begin to explore Stock Rover's metrics. Our screener can incorporate both simple expressions and more complex algebraic equations. Additionally, the screener gives immediate feedback on how many stocks pass with each added criteria, so they can get a sense for how to build a screener that lets in a manageable number of stocks.

Quant screening, a Premium feature, offers even more flexibility in building a screener, allowing students to separately weight criteria so that the list of passing stocks is ranked. [Learn more about screening here.](#)

### **Financial Statements**

Understanding financial statements is at the heart of fundamental investing, and with Stock Rover your students can quickly find and compare financial statements for any number of stocks. The Table has pre-built Views for the Income Statement and Balance Sheet, so your students can compare the net income, net margin, and interest expense of different companies. Furthermore, the Detail tab contains historical data from yearly and quarterly financial statements so they can see how a company's core business has been doing over time.

### **Peers**

Not only can you load industries and sectors into the main Table, but our Peers tab in the Insight Panel always shows industry peers for the selected stock. Just like the main Table, you can add columns and sort and filter data. This makes it easy to see how any particular company stacks up against its peers.

### **Research Links**

Students can keep a list of bookmarked links to other financial research sites right in Stock Rover. Links are specific to the selected ticker, so opening a link brings you to the relevant page.

### **Data Definitions**

Nearly every metric in Stock Rover comes with a description that explains how it's calculated, as well as how it's typically interpreted. Just by right-clicking a column header in the Table, a student can quickly bring up a window within the app that includes the metric's definition, benchmark values, and a hyperlinked list of related metrics.

For more ideas on how we use Stock Rover to conduct real-world investment research, see our [blog](#), [webinars](#), and [videos](#).

We hope you've found this guide useful. If you have any questions on how to best use Stock Rover as a teaching tool, don't hesitate to email us at [support@stockrover.com](mailto:support@stockrover.com).