Guide to

Stock Rover Premium

Updated January 2016

Welcome!

This guide will show you how Stock Rover's Premium features can help you make smarter investing decisions in a seamless, efficient way. All users are entitled to a 14-day free trial of Stock Rover Premium—learn how to activate the trial here.

Pricing information is here. Remember, if Stock Rover Premium leads you to even just one single better investment decision, it will have more than paid for itself. Stock Rover Premium is meant to be a powerful ally in your investing life, so every feature of it is designed to do one or more of the following:

1. Find and research promising investment opportunities
2. Help you monitor the performance and risk level of your investments
3. Lead you to relevant portfolio insights that can be used to make better decisions
4. Save time and help you stay organized

You can see the full list of Premium features in this Plan Comparison, and you can find detailed instructions for using these features on our searchable How-To pages.

Get started with this guide by jumping to any of the sections below:

A is for Alerts

Screen Like You've Never Screened Before

Portfolio Perfection

Deep Data

Tools for Annotating, Organizing, and Optimizing your Workflow

StockRover

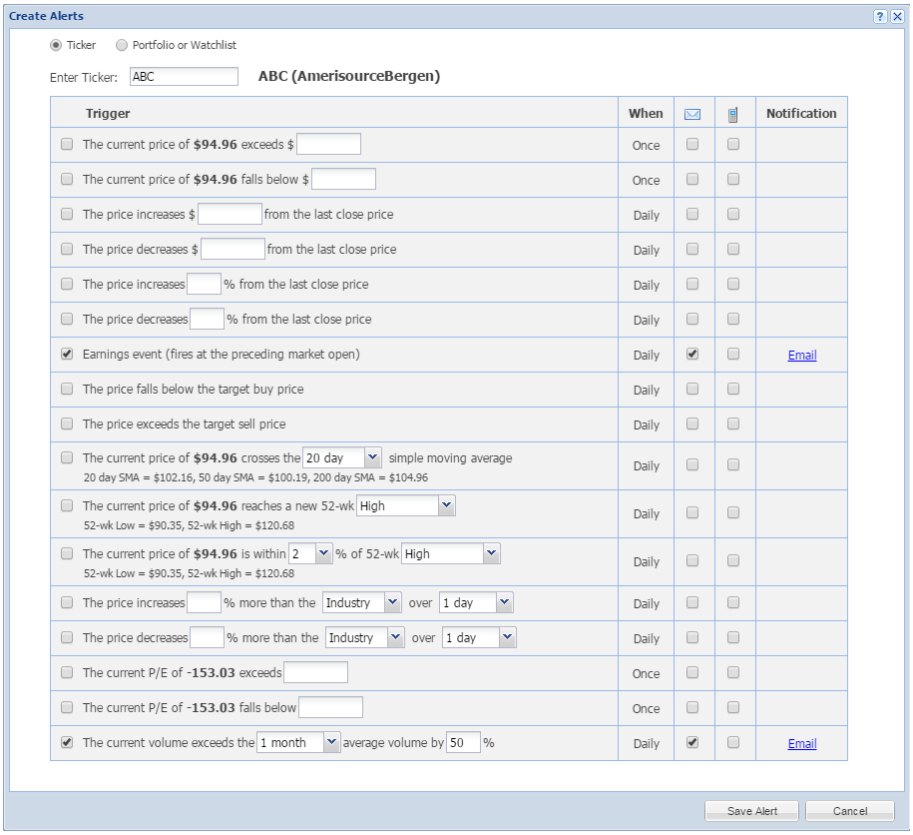
A is for Alerts

Get notified when something important happens. You can receive alerts by text, email, or just via the Stock Rover alerts window.

For example you might want to set an alert for when…

- A ticker crosses a target price (as defined by you)
- A company's earnings report is about to be released
- A ticker crosses its simple moving average
- The P/E of a company hits a certain level
- The volume on any ticker in a portfolio or watchlist experiences a surge in trading volume
- A ticker in a portfolio or watchlist hits a new 52-week high or low

These trigger criteria can be managed through the 'Manage Alerts' option from the Start menu. Or, just right-click any row in the Table and find the menu option to 'Create Alert.' For additional instructions, see our Alerts How-To.



Setting up an alert on a stock

StockRover

Screen Like You've Never Screened Before

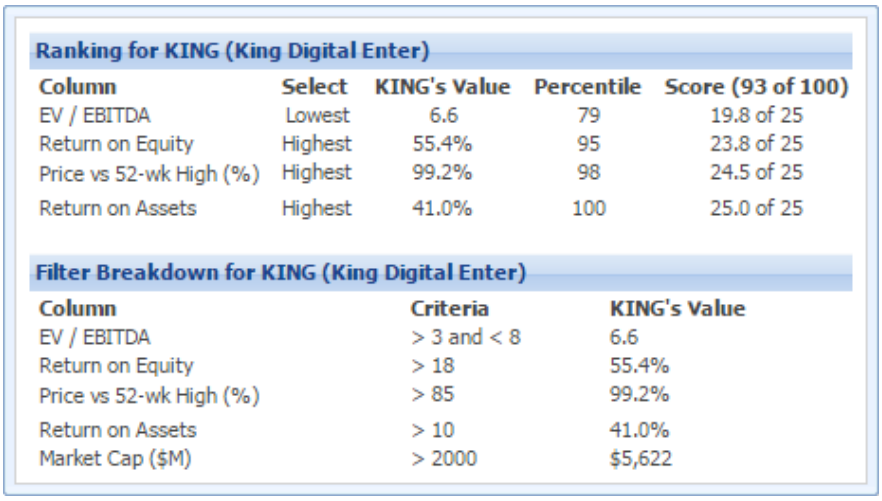
Stock Rover's Premium screener offers significant advantages over Basic screening. You can rank stocks by assigning weights to your screening criteria, create equations to directly compare two or more metrics, and screen using historical data and trends. To walk through an example with each method, see our blog post 3 Ways to Screen for a GARP Stock. Test out and explore the screeners in the Stock Rover Library for inspiration.

Ranked Screening

Ranked screening uses weighted criteria to score (and then rank) stocks. You can also use your weighted criteria to score and rank stocks in a portfolio or watchlist. See our Ranked Screening How-To for detailed instructions.

When you check the 'Use Advanced Ranking Features' box at the top of your screener editor, you will then be able to assign weights to any metrics you like. For example, if you want to see stocks with strong performance relative to their industry, you could weight the return vs. industry metrics.

Once you set your weights and run the screener, your results will be returned to you in the Table with a Rank column showing the order of the passing stocks. When you mouseover a stock's rank, you'll get information about the stock's score as well as its performance in all of the screener's criteria.



Ranking for KING (King Digital Enter)

Column	Select	KING's Value	Percentile	Score (93 of 100)
EV / EBITDA	Lowest	6.6	79	19.8 of 25
Return on Equity	Highest	55.4%	95	23.8 of 25
Price vs 52-wk High (%)	Highest	99.2%	98	24.5 of 25
Return on Assets	Highest	41.0%	100	25.0 of 25

Filter Breakdown for KING (King Digital Enter)

Column	Criteria	KING's Value
EV / EBITDA	> 3 and < 8	6.6
Return on Equity	> 18	55.4%
Price vs 52-wk High (%)	> 85	99.2%
Return on Assets	> 10	41.0%
Market Cap ($M)	> 2000	$5,622

A tooltip showing detail about a ranked stock's score

Whereas filters act as pass/fail tests to narrow down a population, ranked screening guides you to the top scoring stocks based on criteria you have designated as important. You can use filters and ranking together for maximum screening power.

Tip: Rank a Portfolio or Watchlist

You can use weighted screener criteria to rank a portfolio or watchlist. To do this, right-click a ranked screener, and select 'Apply Ranked Screener to Watchlist/Portfolio' and then select the watchlist or portfolio you wish to score. The scored watchlist or portfolio stocks will then be loaded into the Table with two new columns, Rank and Rank Within Table.

The Rank column shows how the stock ranks in the context of the wider screener (if it doesn't pass the screener's filters, then it will not have a rank in this column); the Rank Within Table column tells you how it stacks up against the other stocks in the current population.

Freeform Equations

When you check the 'Use Freeform Equations' box in the screener, you unlock a whole new level of filtering flexibility. Below are just a few examples of the ways in which this capability can be used.

- **Relate two metrics**
  - Find stocks with accelerating sales growth:
    ```
    Sales 1-Year Chg > Sales 5-Year Avg
    ```
  - Find companies with improving profitability:
    ```
    Return on Equity [now] > Return on Equity [1 year ago]
    ```
- **Create a custom ratio or metric**
  - Measure recent price momentum:
    ```
    EMA 20/SMA 20
    ```
  - Use in the Graham Defensive Screener:
    ```
    (Price/Earnings)*(Price/Book)
    ```
- **Specify a level or rate of growth using a coefficient**
  - Find companies whose current EPS is over 10% greater than last year's EPS:
    ```
    EPS [now] > (1.1* EPS [1 year ago])
    ```
- **Use Boolean operators (and, or) to connect multiple equations**
  - Find stocks with increasing momentum:
    ```
    EMA 20 > EMA 50 and EMA 50 > EMA 200
    ```
  - Find stocks with a manageable debt load:
    ```
    Debt/Equity < 0.5 or Interest Expense < (0.2*Operating
    Income)
    ```

Those are just a few ideas, but the possibilities are endless. For instructions on using equations, see our Equation Screening How-To.

Portfolio Perfection

Stock Rover Premium has a suite of portfolio analysis and planning tools to help you make the best decisions:

- Brokerage Linking: Link with your brokerage account to have your portfolio automatically updated in Stock Rover any time you make a trade.
- Portfolio History: Maintain a detailed portfolio history for the most accurate analytics possible.
- Portfolio Analysis: A host of metrics for understanding portfolio risk, diversification, and performance, organized in our signature flexible and interactive format.
- Correlation Analysis: Explore and understand your portfolio's diversification risk.
- Trade Planning: Have a few trades in mind? Test them out in our Trade Planning tool before committing capital.
- Portfolio Rebalancing: Designate a desired stock and/or sector balance for your portfolio and see what trades you need to make to get there, and how those trades would affect key portfolio stats.

Brokerage Linking

You can connect your Stock Rover account to your brokerage so that the next time you trade in your brokerage portfolio, it is automatically updated in Stock Rover, with no work on your part required. It's quick to set up and completely secure. Note that you cannot execute trades through the Stock Rover platform.

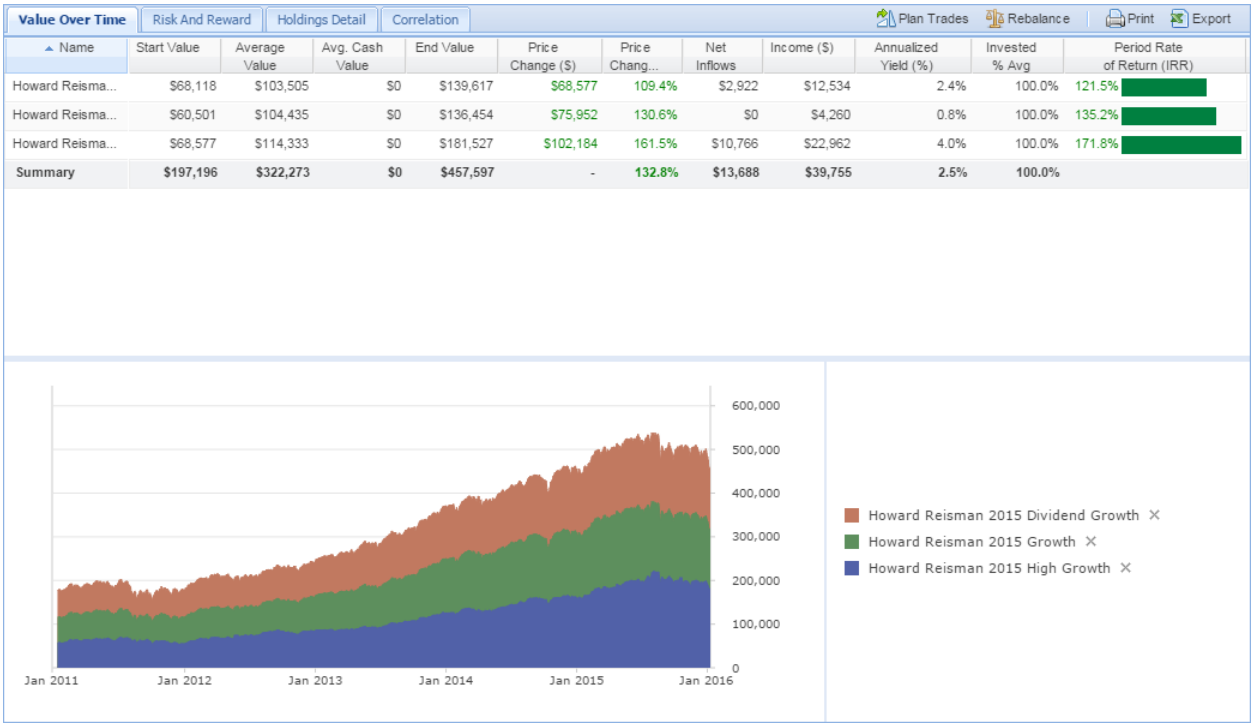
Try it out by finding 'Connect Brokerages' in the Start menu and following instructions here.

Portfolio History

With a Premium account you can maintain portfolio history, so that you not only see your current positions but have a record of past positions. This is not only useful for your own recordkeeping, it will provide you with more accurate analytics in the Table, Chart, and Portfolio Analysis window. If your portfolios are linked to your brokerages, changes will be recorded and saved as part of your history. To add older history, such as trades that occurred before you joined Stock Rover, you can update past positions according to the instructions found here. Note that linked portfolios must be temporarily unlinked to be modified.

Portfolio Analysis

Open the Portfolio Analysis window (select the menu option 'Analyze Portfolios') to explore our heaviest-hitting analytics over different periods. This window can be detached from the Stock Rover screen so that you can keep it open while you reference other parts of the program.



The Value Over Time tab of the Portfolio Analysis window

Within the window's four tabs, you'll find data like money-weighted return, risk-adjusted performance, the Sharpe ratio, each holding's contribution to your portfolio's total return, and a matrix of correlation. You can compare multiple portfolios in these metrics, or just focus on one.

These are some of the questions you can answer in the Portfolio Analysis window:

- How well are your portfolios performing?
- What has been the total dividend income?
- Have you beaten the market? What about when you account for risk?
- How much does each holding contribute to total return?
- How correlated are the stocks in a portfolio?

It's worth getting to know each of the different metrics (right-click a column header for more information about it) and viewing them over different periods. Go here for instructions on using the Portfolio Analysis window.

Correlation Analysis

The fourth tab of the Portfolio Analysis window is home to an interactive correlation matrix. Correlation indicates how correlated the price movements of any two assets are and it is a tool for understanding and manageing portfolio risk. This blog post explains what correlation is, why it's important, and how to use it when planning your portfolio.

Ticker	BFR	CIBEY	CNC	EXP	HAIN	HCG....	LNR.TO	MIDD	MYGN	Mid Cap	OTC....	PVF.V	SES.TO	STN.TO	TRN	XRS
BFR	1	-0.30	-0.19	0.48	-0.07	0.55	0.14	0.14	0.56	0.46	-0.35	0.65	-0.11	-0.01	0.32	-0.12
CIBEY	-0.30	1	-0.02	0.14	0.81	0.09	0.18	0.63	-0.67	0.26	-0.50	-0.41	0.70	-0.53	0.32	-0.70
CNC	-0.19	-0.02	1	-0.59	-0.24	-0.62	0.03	-0.16	0.20	-0.05	0.55	-0.05	0.00	0.20	-0.45	0.44
EXP	0.48	0.14	-0.59	1	0.50	0.97	0.33	0.58	0.03	0.71	-0.58	0.21	0.49	-0.12	0.90	-0.59
HAIN	-0.07	0.81	-0.24	0.50	1	0.49	0.34	0.78	-0.55	0.54	-0.67	-0.16	0.85	-0.49	0.68	-0.86
HCG....	0.55	0.09	-0.62	0.97	0.49	1	0.31	0.55	0.06	0.69	-0.65	0.30	0.44	-0.15	0.87	-0.61
LNR.TO	0.14	0.18	0.03	0.33	0.34	0.31	1	0.68	0.17	0.78	0.08	-0.02	0.54	0.53	0.53	0.00
MIDD	0.14	0.63	-0.16	0.58	0.78	0.55	0.68	1	-0.16	0.81	-0.47	-0.10	0.76	-0.03	0.75	-0.56
MYGN	0.56	-0.67	0.20	0.03	-0.55	0.06	0.17	-0.16	1	0.20	0.36	0.52	-0.42	0.52	-0.10	0.49
Mid C...	0.46	0.26	-0.05	0.71	0.54	0.69	0.78	0.81	0.20	1	-0.27	0.26	0.71	0.21	0.83	-0.34
OTC....	-0.35	-0.50	0.55	-0.58	-0.67	-0.65	0.08	-0.47	0.36	-0.27	1	-0.12	-0.39	0.72	-0.53	0.88
PVF.V	0.65	-0.41	-0.05	0.21	-0.16	0.30	-0.02	-0.10	0.52	0.26	-0.12	1	-0.13	0.05	0.16	0.02
SES.TO	-0.11	0.70	0.00	0.49	0.85	0.44	0.54	0.76	-0.42	0.71	-0.39	-0.13	1	-0.20	0.72	-0.61
STN.TO	-0.01	-0.53	0.20	-0.12	-0.49	-0.15	0.53	-0.03	0.52	0.21	0.72	0.05	-0.20	1	-0.08	0.76
TRN	0.32	0.32	-0.45	0.90	0.68	0.87	0.53	0.75	-0.10	0.83	-0.53	0.16	0.72	-0.08	1	-0.63
XRS	-0.12	-0.70	0.44	-0.59	-0.86	-0.61	0.00	-0.56	0.49	-0.34	0.88	0.02	-0.61	0.76	-0.63	1

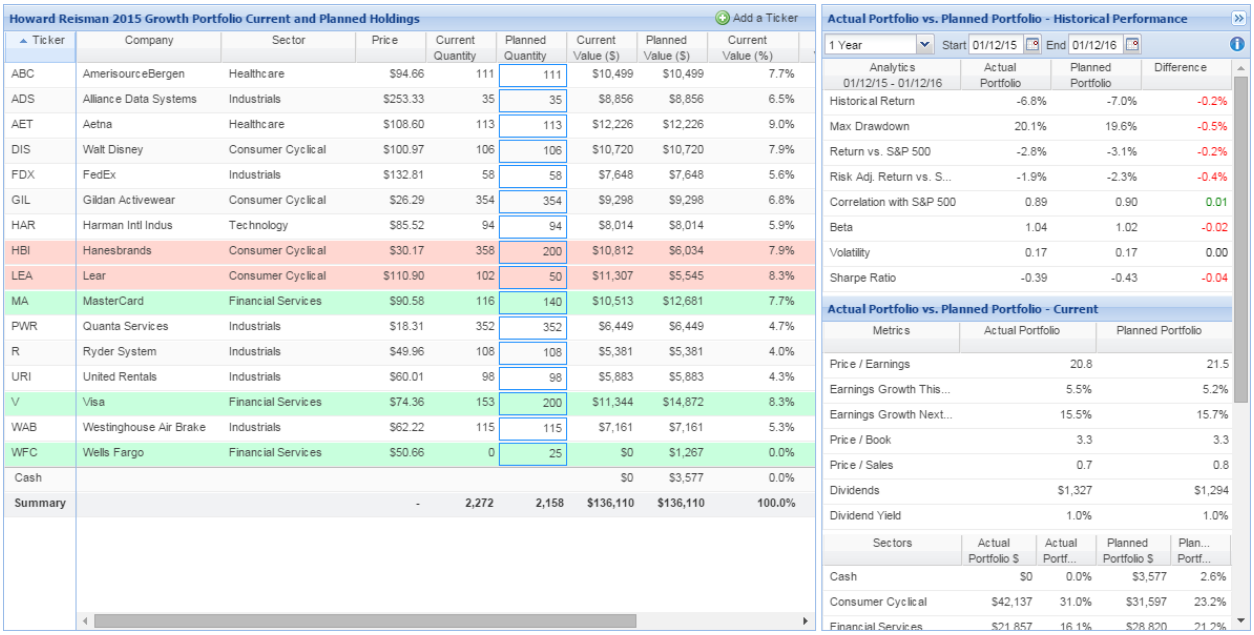
An example of a portfolio's correlation matrix, with the heat map setting on

In addition to seeing correlation for all the tickers in a given portfolio or set of portfolios, you can also compare tickers from a watchlist or by entering tickers of interest in the freeform searchbox.

Trade Planning

Trade planning is a fast and easy tool for exploring how a certain trade or set of trades, would affect your portfolio. It allows you to test an alternative version of your portfolio against the real portfolio.

Open the menu item 'Plan Trades' to access this facility. Once you're there, it's simple to use: just change the quantities of your holdings, or add in new tickers you might be thinking of buying. As you change the contents of your portfolio, you'll see the stats on the right side of the window change. You'll be able to see how your portfolio performance would have been different had you made these trades at a certain time in the past, and you'll also see how your portfolio's financials and sector allocation would change.



Trades modeled in the Trade Planning facility

Run your trade ideas through the Trade Planning facility before committing real dollars. Find instructions for how to do this in our Trade Planning How-To.

Portfolio Rebalancing

You may find that over time your portfolio gets increasingly unbalanced as you make trades and as some holdings outperform others. To map out a plan for getting your portfolio back to your desired balance, you can use the Portfolio Rebalancing window.

Our Rebalancing tool is similar to Trade Planning in that it allows you to play around with an alternative version of your portfolio, without affecting the original portfolio in Stock Rover. In this case, instead of setting up individual trades, you select your desired portfolio balance—for example, you might specify that you want to be 25% in a particular stock or sector—and then the tool will calculate the trades you need to make to achieve that balance.

Sector	Percentage	$ Value
Consumer Cyclical	31.0%	$42,227
Financial Services	16.1%	$21,892
Healthcare	16.7%	$22,732
Industrials	30.4%	$41,436
Technology	5.9%	$8,006
	100.0%	

Entering sector balances in the Portfolio Rebalancing facility (you can also enter desired balances for individual equities)

You'll be able to specify a "drift tolerance," which is how much you would permit the portfolio to deviate from the desired balance. For example, if you set a desired balance for ticker XYZ at 15% and your portfolio currently has 12% XYZ, no trades would be recommended if the drift tolerance were set at 3% and above. Essentially, drift tolerance allows you to specify how strictly you want to adhere to your desired balance.

See our Portfolio Rebalancing How-To for further instructions on using this feature.

Deep Data

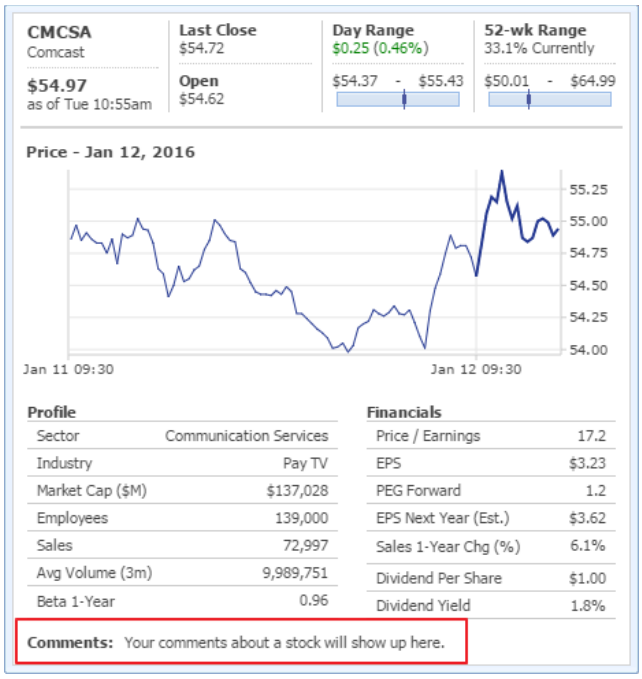
In Premium you have access to more data, meaning both additional metrics and historical data. All this additional data is integrated throughout the program. Here's a quick breakdown of the data that Premium members enjoy on top of the robust data already included in a Basic subscription:

- **10 years of historical data** in the Chart, Table, Insight panel, and anywhere else that historical data is found.
- **Premium metrics**. There are approximately 100 metrics that are only available to Premium users, including user favorites such as the Altman Z Score, Piotroski F Score, Analyst Ratings, Debt/Assets, EV/EBIT, and much more. There are denoted by a yellow star in the screener or 'Add Column' searchbox. There are also a handful of specialty metrics that can be imported into your account from the 'Metrics' section of the Library. On top of the Premium-only columns, there are portfolio-specific metrics found in the Portfolio Analysis window, described above. You can get a definition for almost any metric using the 'Explain' menu item in a column's drop-down menu, or in our online glossary.
- **Fundamentals charting**. Whereas Basic members can chart 6 common fundamental indicators, Premium members can choose from over 100 and can save a shortlist of favorites. Premium members also have the ability to chart multiple fundamentals together using the 'Metric Package' feature.
- **More tickers in the Table.** Whereas Basic members can only see a maximum of 110 tickers from a given dataset (for example, only the first 110 sorted tickers of the S&P 500), Premium members can see up to 505 tickers on a single page, and can page through datasets that are larger than that.

Tools for Annotating, Organizing, and Optimizing your Workflow

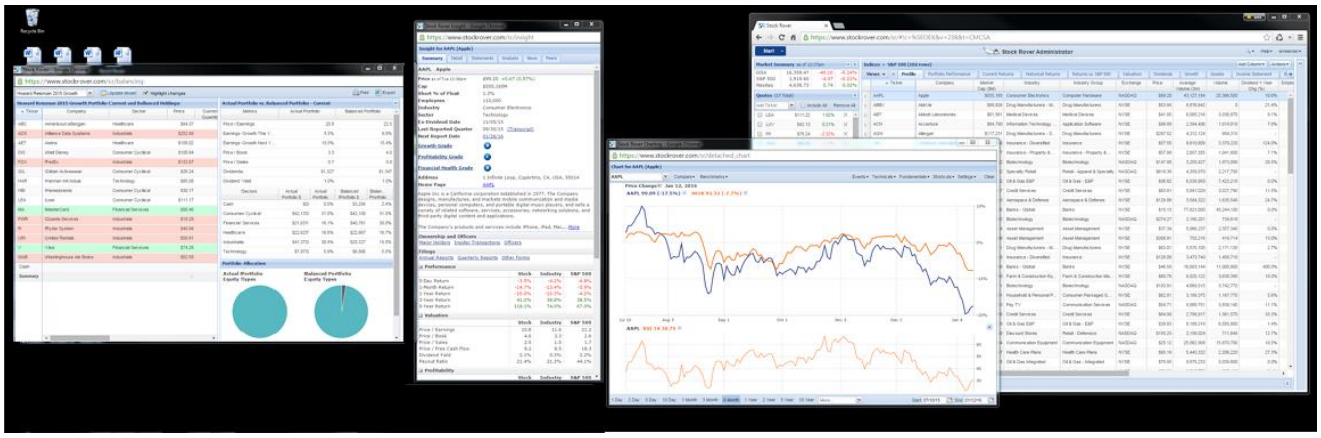
Keep track of your ideas, catalogue and group stocks, and make the most of your Stock Rover workstation with these nifty tools and helpful extras.

- **Add commentary.** Want to make a quick note to yourself about a stock? Right-click its row or add the Comments column to jot something down. The comment will stay associated with the stock and appear at the bottom of the ticker tooltip, like so:



- **Take notes.** For more in-depth note-taking, try the Notes facility. You can right-click a stock to 'Add Note' or see all your notes by going to 'Open Notes' from the Start menu.
- **Catalogue tickers with tags.** Use the Tag feature to tag tickers with a keyword or phrase. Tags work similarly to comments in that they can be entered directly in the Table (add the Tag column) or from the right-click menu. Whereas comments are designed for quick freeform note-taking, tags are useful for sorting tickers into categories by which you can then group the Table rows.
- **Group portfolios.** Portfolio folders let you sort your portfolios into different groups that can be compared, or just used as a way to help you stay organized. For example, you might have your personal portfolios in one folder, portfolios you manage for your family members in another, and Stock Rover sample portfolios in a third folder.
- **Export data for offline analysis.** Go to Actions > Save As > Export Table to export the current view and table dataset into a CSV file for offline analysis and recordkeeping. You can also export the historical data for any ticker in the table by expanding the row and clicking the Excel icon.
- **Spread out by undocking panels.** Anytime you see a pop-out button like this ↗ you can use it to 'undock' the current panel from the Stock Rover UI. This allows you to spread out your Stock

Rover workstation or keep certain facilities, such as Portfolio Analysis or Notes, open while you work in other parts of the Stock Rover program.



Stock Rover spread into multiple detached panels across two monitors

- **Auto-refresh data.** Stock Rover refreshes data anytime you take an action in the program, but if you want to see fresh data without clicking, you can set it to auto-refresh at 1, 5, or 10 minute intervals. Do this through your Preferences menu (found in your account drop-down).
- **More legroom.** Premium allows you to save and track more portfolios, watchlists, screeners, and custom table views than in a Basic account, plus the ability to keep more tickers in any given watchlist or portfolio. Take advantage of the extra space!

Happy investing!

Thanks for checking out this guide. We hope you find Stock Rover Premium to be a flexible and powerful assistant for your investing life. Enjoy!

StockRover