Stock Rover Demo Outline

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Layout

- There are five main panels:
    - The **Task Wizard** has shortcuts for the most common tasks in Stock Rover, but all of these can be accomplished via other avenues in the program
    - The **Table** is in the top center—it shows stocks and their data
    - The **Insight panel** is on the right, and shows detailed information for whatever stock is selected in the Table
        - There are six tabs here—make sure to explore them all!
    - The **Chart** is in the bottom center
        - It is by default "linked" so whatever you select in the Table is automatically charted—switch the selected ticker and see that the chart updates
    - The **Navigation panel** contains the set of stocks you can load into the Table: portfolios, watchlists, screeners, indices, sectors, industries, and ETFs
        - Click a folder (like "My Portfolios") to load the higher-level items in the Table
- The chart, the Insight panel, and the Task Wizard can all be minimized

Screening Example: Mid- to Large Cap Value

Note: this is *not* a recommendation to buy or sell any stock. These examples are for demonstration purposes only.

- Objective: Find a set of mid to large cap companies that are undervalued
- Use the screener **Large Cap Value** (a default screener)
    - Modify market cap
- Save the results as a watchlist
- Switch the View and sort the data
- Edit the watchlist

Screening Example: Growth

- Objective: Find a sizeable stock that is growing quickly and that I can do further research on.
- Use the "Fast Growing Big Dogs" screener
    - This is Quant screener—uses weights instead of criteria
    - Quants are a Premium feature

In-Depth Stock Research Example: BIDU

Charting

- Chart against a benchmark
- Set a baseline
- Add in technicals and fundamentals

Insight

- **Summary tab:**
    - Market summary
    - Description of company
    - Ownership and officers
    - Insider transactions
    - SEC filings
    - And more—this tab shows different data when a higher level item is selected
- **Detail tab:**
    - Analyst estimates
    - Growth metrics
    - Quarterly or yearly Income Statement summary
    - Quarterly or yearly Balance Sheet summary
    - Quarterly or yearly Cash Flow statement
    - Profitability metrics
    - Financial health metrics
- **News tab:**
    - Aggregates from selected news feeds
    - Click on a story to open in a new window
    - Collapsible sections
    - Stock-specific news on top of market news
- **Peers:**
    - Similar functionality to the main table
    - Shows stocks in the same sector and industry as selected stock
    - Sort columns, filter or remove (by right-clicking column headers)
    - Add research tickers to the table by clicking the green "+" icon
- **Links:**
    - Contains links to other news sites
        - Can be stock-specific
    - Click "Modify" Links
- **Notes* (Premium feature):**
    - Create a database of your own notes
    - Database is searchable and can be filtered by date

Growth Stock Example: YPF

- Find volatility by adding a column to the Table
- Change the time periods for longer perspective in the Chart
- Chart against the industry

- Check out the analyst estimates in the Detail tab in the Insight panel

Portfolio Analysis

- Click “My Portfolios” in Navigation panel to load all the portfolios in the Table
  - The Portfolio Performance view has portfolio-specific metrics
- When the portfolio as a whole is selected in the Table, the Insight panel shows different data:
  - Portfolio Allocation – sector allocation and stock within sector allocation
  - Best Performers, Worst Performers, and most active stocks in the selected time period
- Click a portfolio to load those stocks in the Table
  - Highlight all stocks when the chart is linked to chart them together
  - Add the portfolio as a benchmark
  - Color-code stocks for quick reference

Portfolio Reporting*

- This is a Premium feature
- Select portfolios on the left that you want to analyze, then choose one of the tabs: Value Over Time, Risk and Reward, Holdings, Correlation
- Change the time period at the top
- Sort columns by clicking on the header
- Right-click a column header for a definition (choose “Explain” from the drop-down menu)
- Holdings Detail shows all holdings in the time period, even if you no longer own them
  - Stocks keep their colors from the Table
  - Mouseover the ticker symbol for ownership history
- Correlation tab shows correlation in selected time period among all stocks in selected portfolios and watchlists
  - Container portfolios or watchlists are included
  - Mouseover an identity cell for the most and least correlated
  - Add in a stock, sector, industry, index, etc. with the search box

Portfolio Modeling

- Available to Basic and Premium users
- Allows you to test potential trades to see how it will affect the composition of your portfolio
- To open the modeling facility, right-click the portfolio in the Navigation panel and select “Model”
- First, modify the quantity in the Model Quantity or add a stock with the Add Ticker button
- Then, look on the right to see the analytics for the actual and model portfolio
  - Change the time period for the analytics
- Group the stocks by sector or industry by right-clicking a column header
- Right-click a row to reset the portfolio

➢ See a blog post about portfolio modeling here

➢ See our help pages about portfolio modeling here

➢ Attend a webinar about portfolio modeling on September 25th – registration here

Further Resources

- Help pages and video library are linked at the top of the app
- Feedback button in the top right sends an email to the Stock Rover team (or email support@stockrover.com)
- Or email me at erica.reisman@stockrover.com