Stock Rover's New UI

Changes to the Screen Layout

- **Market Summary** has moved from the Insight Panel's Summary tab to the top left of the screen
    - Click the upward-pointing double arrow icon to roll it up out of view
- The research box, previously at the top of the Table, is now the **Quotes** box underneath the Market Summary
    - Use the search box to add a list of tickers
    - You can also add portfolios, watchlist, indices, sectors, or industries here
        - This allows you to see different items compared in the table—for example, a portfolio and a sector
    - See the price, and the daily change in percent and dollars,
    - Choose whether or not to include the tickers in the Table
    - Click the upward-pointing double-arrow icon to roll it up out of view
- The whole **left-side panel** is now fully collapsible, click the leftward pointing double arrow icon at the top right of the panel to minimize it
- The **Navigation panel** has been reorganized into "Markets" (Indices, Sectors, and ETFS) and "My Stuff" (Quotes, Portfolios, Watchlists, and Screeners)
    - Portfolios has an enhanced drop-down menu
    - Right-click Quotes to save the quotes tickers as a portfolio or watchlist
- The Options menu now lives over on the right under the new **Settings menu**
- Portfolio Reporting, Alerts, and the Library have been removed by the top bar and now can be accessed through the **Start menu**
- Click the **Rover dog** to go to the home page

New Ticker Info Box

- The Ticker Info tooltip has been expanded
- It contains:
    - Company name, price, last close and open price, as well as graphical metrics for the daily and the 52-week trading range.
    - A chart of day's price
    - Profile metrics: sector, industry, market cap, employees, sales, average volume, and beta 1-year
    - Financials metrics: P/E, EPS, PEG Forward, EPS Next-Year (Est.), 17.4%, 0.7% dividend yield

Start Menu

- Like the old Task Wizard, but more powerful, flexible, and compact

- Customize the start menu from 37 different actions, such as “Save Table as Portfolio” or “Chart All Portfolios”
- Use the search box to quickly search for an action
- Some actions will bring up dialog processes that guide you through the process

Changes to the Table

- Quickly jump to any view with the “Views” drop-down menu on the left side of the tabs
- Filter, Save, and Print have been rolled up into Actions in the Table header
    - Filter is now a whole separate window instead of nested filtering
- Add Column has been moved into the Table header
    - Now if you search for a column in the Add Column box, it will tell you which Views contain each of the returned metrics, and you can jump straight to that View from the drop-down menu.
- The Target Price column has now been split into two columns: Target Buy Price and Target Sell Price
    - There are also now two columns: Price to Target Buy (%) and Price to Target Sell (%)

Changes to the Insight Panel

Portfolio Allocation in the Summary Tab

- If you have a portfolio loaded in the Table, the Portfolio Allocation sector includes a line that shows the allocation for the stock that is selected in the Table

Peers

- There is a more attractive “+” icon to add a ticker to the Quotes box
    - Doing so will also change the Table to only show the Quotes tickers
- There is the option to load the stocks in the table
- Filtering through a column header now has an option to filter within a percentage of the metric’s value for the selected stock
- Selecting “Filter Peers” also brings up a box with all Peers column in order to more quickly filter several columns

Notes

- You can now detach the notes panel in order
- You can change how the Notes panel searches for notes. You can choose:
    - To have it automatically search for notes on the selected ticker (or not)
    - To have the search be case sensitive
    - To have it match any word, all words, or the exact phrase in the search box

Changes to the Chart

- The left side of the Chart's toolbar controls the lines that are charted, the right side control any additional Charting settings
- Type into the box on the left to add to the chart, or use the drop-down arrow to find a history of recently charted tickers
- Add or remove comparison tickers by clicking the Compare menu item
    - Also choose to set these stocks as a baseline
- Click a stock in the legend to set it as a baseline
- Remove tickers from the chart by clicking the x in the legend
- The link/unlink controls have gone into the Settings menu

New Feature: Portfolio Rebalancing

- Either add Portfolio Rebalancing to the Start menu, or right-click the portfolio in the Navigation panel and select "Rebalance"
- Rebalance Modeling Window:
    - Add in desired percentages for each stock, or add a new ticker
    - Add in a drift tolerance—this will only register trades for stocks that have their allocation outside of the drift tolerance
- When you click "Update" you will be brought to a window similar to the Portfolio Modeling facility
- Highlight Changes is checked and will show share reductions in red and share additions in green
- The panel on the right (make sure it's not minimized!) shows analytics for the actual portfolio and model portfolio over the selected time period
- Click "Update Model" to change the balanced percentages
- Click Export to export the list of trades to a CSV

Enhanced Feature: Portfolios (not in this release, but in the one after)

- Portfolios can now either be simple positions-based portfolios or transactional-based portfolios
- Basic users will be able to only create positions-based portfolios

Transactional Portfolios

- Start→Create Portfolio→Manual Input for Transactional Portfolios
- You can now add a stock transaction, asset transaction, or cash transaction to your portfolio
    - Stock transactions can include fees, buys to cover, sell to short
    - Asset transactions can be jewelry, real estate, stock, or other, and can be buys, sells, distributions, interest, transfer, other, or revalues
    - Cash transactions can show interest, transfers, or other, and can be on credit or margin