Efficient, Seamless Investment Research with Stock Rover

# Check the Health of the Markets

* Check Summary tab for the day’s market summary
* Put all indices in Table by clicking “Indices” in Navigation panel
  + See Top Movers in Insight panel
* Chart S&P 500 by clicking on the row—if the chart is linked it will be added to the Chart.
* Add in SMA to see trends

# Check Value vs. Growth

* Look in Navigation Panel🡪ETFs🡪Domestic Diversified for small, mid, and large cap for both value and growth (6 ETFs total)
* Create Watchlist of six ETFs and chart them against the S&P

**Efficiency Tips in this Section**

* Click parent item in Navigation panel to see constituent elements in Table
* Link the chart and the Table
* Use categorized ETFs to quickly find proxies for segments of the market
* Quickly add a column to the Table with Add Column button
* Sort the table by clicking a column header
* Add a ticker to a watchlist by right-clicking the ticker
* Save a watchlist of ETFs to compare against the S&P
* Set the S&P 500 as a baseline in the chart to see relative performance
* Use multi-select to chart several tickers at once

# Screen for Growth

* Go to Investor Library and browse (or search)
* Import Mid Cap Rockets
  + Note: this is a quant screener, which is a Premium-only feature, but Basic users can use the non-quant features of the screener
* Save screener results as a watchlist
* Apply quant to watchlist
* Chart relative performance of these stocks against the S&P 500
* Chart SMA on top of stocks
* Remove stocks that don’t look good
* Color or tag stocks that look particularly interesting
* Group stocks by color, create new watchlist with colored stocks

**Efficiency Tips in this Section**

* Add Navigation panel tooltips (Options🡪Tooltips)
* Search the Investor Library for pre-built screeners
* Save screener results as a watchlist
  + Add a date to the description as a bonus backtest
* Rank a watchlist with a quant
* Scroll through the charts of the stocks in a watchlist
* Add in both sector and industry to see how the stock compares
* Easily remove a stock from a watchlist by right-clicking
* Color or tag stocks by right-clicking
* Group stocks by color or tag by right-clicking a column header
* Multi-select stocks and right-click to create a new watchlist

# Screen for stocks that are out of favor

* Go to Investor Library and import the “Revert to Mean” screener
* Chart screener with different time periods (note: does *not* backtest)
* Run screener
* View Analyst Estimates for selected stock in the Detail tab
* Sort by “EPS Next Year Estimate Trends” metric in the Table
* Take stocks with current EPS estimate v. 90-days ago > 0 and tag
* Switch to my custom-made “Versus Industry” View
* Sort by P/E Industry Decile
  + Use Column Info Box to see description and find related metrics
* Tag multiple stocks at once
* Save all tagged tickers as a watchlist

**Efficiency Tips in this Section**

* Chart a screener (does not backtest) to check it
* See the Analyst Estimates in the Detail tab
* Sort by EPS Next Year Estimate Trends to find just stocks whose EPS has been revised upwards
* Create custom View with the specific metrics you want
* Use the column info box for metric descriptions
* Tag several tickers at once with multi-select
* Save all tagged tickers as a watchlist or portfolio by selecting “Manage Tags”
* Delete a tag to remove all the tags from tickers at once

# Look at Sector Performance

* Chart all sectors and compare against a flatlined S&P 500
* Create a note with best sectors *(Premium feature)*
* Click into sector, sort industries by best return versus sector
* Find the top movers in the Insight panel from the top-performing industry
* Find best performing stock in best-performing industry with the Top Movers in the Insight panel
* Find competing stocks via the Peers tab

**Efficiency Tips in this Section**

* Chart all sectors against the S&P 500 in any time period
* Create a note with any observations (Premium feature)
* Sort Industries in the Table
* Find top movers in industry with the Insight panel
* Add a research ticker straight from the Top Movers section
* View all stocks in the same industry in the Peers tab
* Add, filter, and sort columns to the Peers tab
* Add research tickers from the Peers tab

**Miscellaneous Tips**

* Use back button in Table
* Use research box drop-down for history

Thanks for watching! Please email [erica.reisman@stockrover.com](mailto:erica.reisman@stockrover.com) with any feedback.