# Stock Rover 101 — Webinar Outline

## A Few Basics

* Left Side Panel
  + fully collapsible, or collapse individual menus
* Help Menu
  + upper right hand corner, along with search and your account information
  + Help, What’s new, Contact Us

1. Start Menu - for starting almost any task

* Manage Alerts, Analyze Portfolio, Connect to Brokerage, Open Notes, & more
* customize with different actions, some of which will bring up dialogue boxes to guide you
* search box allows you to search for any action in the start menu
* Investors’ Library lives here as one of the start menu options
* connect to your brokerage account from here, or the right click menu on portfolios in the navigation panel

2. Market Summary

* lists latest updates in “as of”
* links to Markets homepage if you click on hyperlinked “market summary”

3. Quotes Box

* add list of tickers, portfolios, watchlists, indices, sectors, or industries
* see price and daily change (% or $)
* can include or not include tickers in Table with checked box (uncheck individuals, or click “include all” to see or not see them in the table)
* Ticker Tool Tip

4. Navigation Panel

* Populates Table rows
* Portfolios, watchlists, quotes, and screeners are user-defined under “My Stuff”
* Create or import your own
* Re-order the list by dragging-and-dropping
* Indices, Sectors, Commodities and ETFs for browsing under “Markets”
* Right-click any item in Navigation panel for menu of options

## The Table (center top panel)

* “Portfolios” at top of table shows which portfolio you are currently viewing, and easy to jump between portfolios by clicking it
* Columns (metrics) are organized into Views
  + jump to any view with the “views” drop down menu
* Views are customizable
  + Add, remove, or sort by a column
  + Right-click on a column header or View tab and select ‘Modify’
* Right-click any row, column header, or View tab for a menu of options
* See ticker history
  + 10 years/quarters data for Premium; 5 years/quarters for Basic
* Ticker info tooltips
* Filter, save, and print are all located in “actions: in table header
  + Filtering
    - separate window
  + Filters stay on Table until removed by you
* Save Table
  + Save stocks in the Table as a watchlist or portfolio
  + Export to CSV (Premium)
* Print
  + Copy and paste printable format into spreadsheet programs
* Add column
  + search for column in box, tells you which views contain each of the returned metrics, jump straight to that view from the drop-down menu
* Target Buy Price and Target Sell Price

## Screening

* Run a screener instantly by clicking on it in the Navigation panel
  + screener brings up number of passing stocks in Table
* Modify or create new screener by right-clicking
  + manipulate by changing the metrics of the stock (you can how many are passing with change)
  + checking boxes only shows you how many would be passing with or without that metric, doesn’t apply to table
  + to have it apply to table, need to remove the screener by clicking the “x”
* Save interesting population of stocks as watchlist

## The Chart (center bottom panel)

* Links with Table
  + link / unlink controls are now in the settings menu
  + left side of chart’s toolbar controls the lines that are charted, the right side controls any additional charting settings
  + type into box on left to add to the chart, or use the drop down arrow to find a history of recently charted tickers
* Change time periods
* Zoom in on a chart
* Primary ticker
  + Replaced by what is selected in Table (if linked)
  + Swap tickers to be primary tickers
  + Chart vs. Compare in chart
  + Dependent benchmarks
  + Technicals apply only to primary ticker
  + Fundamental metric packages apply only to primary ticker
    - add or remove comparison tickers by clicking the compare menu item, can choose to set these stocks as baseline
* Set a baseline
  + click on the ticker in the chart to do this
* Adjust price for dividends
* Add technicals, fundamentals, or change chart settings
  + bollinger bands
  + PE as fundamental, charts below ticker
* Shortcuts (Premium)
  + Save your favorite chart configurations to apply them easily

## The Insight Panel (right side of screen)

* Populated by the row that is selected in Table
* Summary tab
  + Market summary
  + Home Page (company summary)
  + Ownership and officers (SEC filings, major holders, and insider transactions)
  + Filings (reports, other forms)
  + Key performance details
  + Portfolio allocation - if portfolio is loaded in the table, shows the allocation for stock that is selected in table
  + Links to outside research sites
* Detail tab
  + Detailed financial data
  + Switch between quarterly and yearly data (Q/Y button)
* Statements tab
  + Earnings statements for whatever stock is loaded in the table, switch between quarterly and yearly
* Analysts tab
  + Find data on analyst ratings and estimates from analysts following whatever stock is selected in the table
  + Use radio buttons at top to select between ratings and estimates
* News tab
  + Stock-specific or market news
  + Click on a story to view it
  + Add news feeds from list
* Peers tab
  + Functions similarly to main table; always shows industry peers of selected stock
  + Option to load the stocks to the table
  + Filtering through column header has option to filter a metric within a percentage of the selected stock

## Markets:

* Markets - access to earnings calendar, Forums, markets homepage and additional news
  + great for daily visits to stay updated on stocks of interest.
  + Access through “Market Summary” hyperlink in Stock Rover, or click on “Markets” in homepage.

## Stock Rover Mobile

* Tablet and phone apps – free and intuitive to use
* Just go to Stock Rover in the browser of your phone or tablet
* iPad and iPhone users can download the native app through the Apple Store

## Additional Resources

* **Video Library** — www.stockrover.com/video.html
  + Short tutorials can help you review content from this webinar
  + Full recorded webinars will give you workflow ideas and Stock Rover tricks
* **How To Guide** — www.stockrover.com/help-how-to.html
  + Step-by-step instructions for all Stock Rover features
* **Support** — www.stockrover.com/support-data.html
  + Browse past questions from our users
  + See a glossary of Stock Rover terms
* **Metrics & Tickers** — www.stockrover.com/metrics-profile.html
  + A list of all the metrics and tickers currently available in Stock Rover

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