# Stock Rover 101 — Webinar Outline

## A Few Basics

* 5 main panels can be resized
* Right-click menus
  + Can also be accessed by hovering over an element for drop-down button
  + These menus are essential for exploring Stock Rover

## Toolbar (top of screen)

* Top of Form
* Portfolio Reporting (Premium)
  + Contains in-depth portfolio analytics
  + Select which portfolios you want to analyze & over what time periods
  + Metrics and graphs for determining performance, risk, and best/worst stock picks
  + Correlation to help you see diversification risk
  + Can be opened in another window or printed
* Bottom of Form
* Investors’ Library
  + Import anything into your account for free
  + Submit your own portfolios, screeners, etc.
* Options
  + Includes a variety of Stock Rover settings, plus your account information
  + Turn on/off different kinds of tooltips
* Help
  + Links to how-to guide, video pages, and support
* Searchbox
  + Opens search results in a new browser tab
* Invite a Friend
  + Please do! ☺
* Alerts (Premium)
  + Get notified immediately when something interesting happens
* Feedback
  + Email us with any comments, questions, or problems
  + See our support policy: www.stockrover.com/support-policy.html
* Logout

## Task Wizard (top left panel)

* Helps you accomplish the most common tasks in Stock Rover

## Navigation Panel (lower left panel)

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

## The Table (center top panel)

* Table header orients you as to what rows are currently displayed
* Columns (metrics) are organized into Views
* 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
* The Research Box
  + Search for tickers by company name or ticker symbol
  + Tickers in the Research Box are called “research tickers”
  + Research tickers stay in the Table until you remove them
  + View them with any dataset, or view only research tickers
  + Get a history of past research tickers
* Filtering
  + Filter on the columns in the current View
  + 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

## Screening

* Run a screener instantly by clicking on it in the Navigation panel
* Modify or create new screener by right-clicking
  + See how many stocks pass screener as you build it up
* Add Quant features for ranking (Premium)
* Screen on historical data & compare metrics to each other using freeform equations (Premium)

## The Chart (center bottom panel)

* Links with Table
* Change time periods
* Zoom in on a chart
* Primary ticker (leftmost ticker) is special
  + Replaced by what is selected in Table (if linked)
  + Dependent benchmarks
  + Technicals apply only to primary ticker
  + Fundamental metric packages apply only to primary ticker
* Set a baseline
* Adjust price for dividends
* Add technicals, fundamentals, or change chart settings
* 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
  + Company summary
  + SEC filings, major holders, and insider transactions
  + Key performance details
* Detail tab
  + Analyst estimates and detailed financial data
  + Switch between quarterly and yearly data (Q/Y button)
* News tab
  + Stock-specific or market news
  + Click on a story to view it
  + Add news feeds from list
* Peers tab
  + Shows industry peers
  + Columns can be added, removed, and filtered
  + Info tooltips appear when you mouseover a ticker
* Links tab
  + Links to outside research sites
  + Modify the list and add your own
  + Cash symbol means the site requires a login
* Notes tab (Premium)
  + Create research notes while you work in Stock Rover
  + Notes are time-stamped and searchable

## 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 and click “mobile sign-in”
* 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