# 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