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## Introduction

Welcome to our Quick Start Guide!

We've put together this guide to help you get up to speed with Stock Rover as quickly and easily as possible. In this guide, you'll find step-by-step instructions to take advantage of the more common capabilities, along with tips to help you get the most out of Stock Rover.

Note: Some of the features shown require a Stock Rover Premium or Stock Rover Premium Plus subscription.

## Start Menu

All of Stock Rover's features can be accessed through the vertical **Start Menu** on the left side of the screen. The menu is fully customizable, allowing you to display only the tools you use most.

The **Start Menu** is logically grouped into four separate sections.

1. **Today's Market** – Provides a snapshot of market conditions and the performance of your portfolios.
2. **My Collections** – Lets you research tickers from the Quotes List, Portfolios, Watchlists, and Screeners. The "World" section includes broad datasets such as indices, sectors, ETFs, and commodities. You can also create, edit, or delete portfolios, watchlists, and screeners.
3. **Portfolio Tools** – These tools enable you to take a deep dive into portfolio performance.

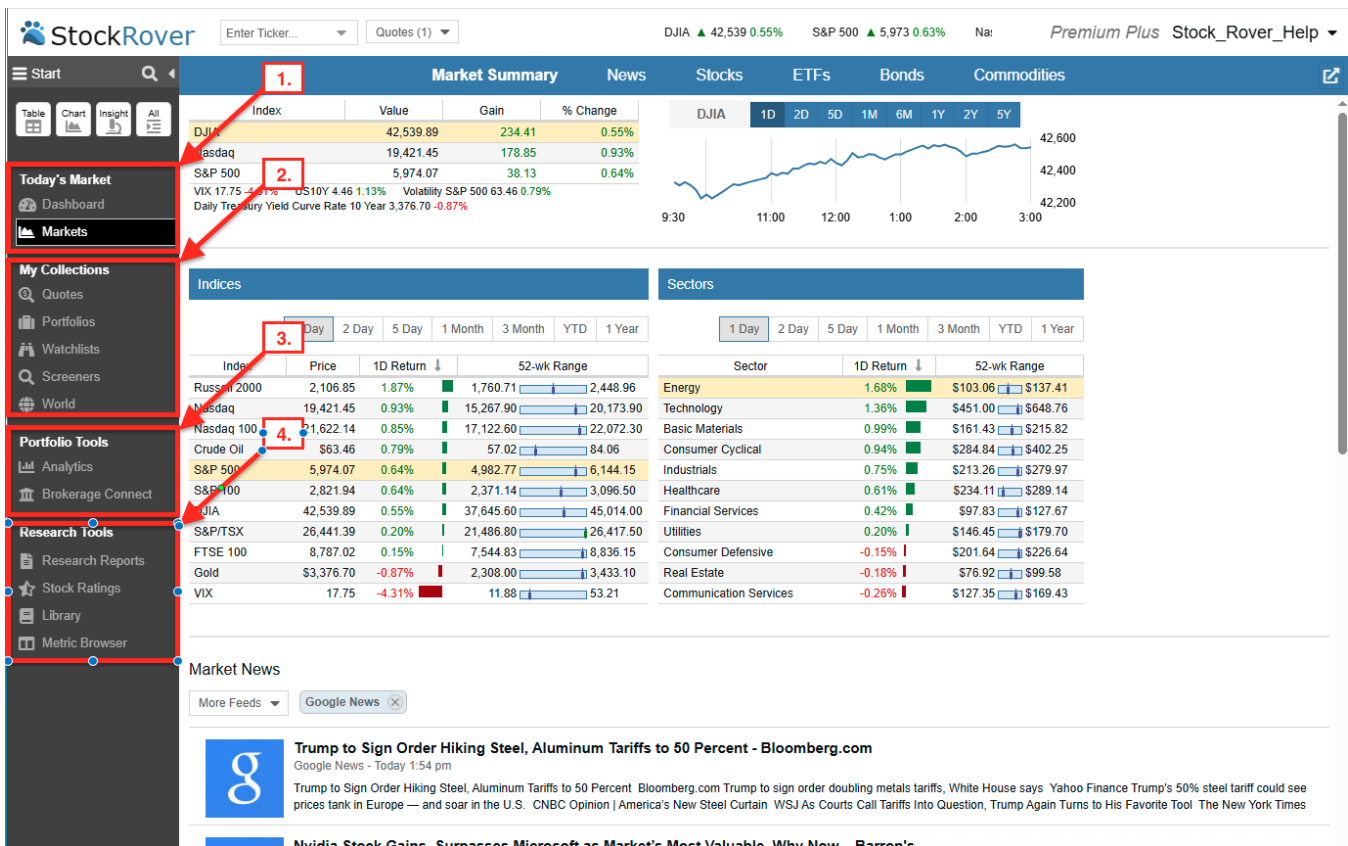
Users who wish to connect Stock Rover to their brokerage will want to pay special attention to the Brokerage Connect tool.

Brokerage Connect establishes a read-only feed to brokerage account(s) and synchronizes the positions with Stock Rover portfolios. The Stock Rover portfolios then mirror the portfolio(s) in the brokerage account(s).

4. **Research Tools** – Includes advanced tools and resources to deepen your analysis.

Below, the Start Menu is shown in [Simple Mode](#), which reduces the interface to just the core features.

You can customize your Stock Rover Start Menu to display only the features you use most frequently. Simply select the hamburger icon in the upper left-hand corner of the Start Menu for configuration options.



The screenshot shows the Stock Rover interface in Simple Mode. The left sidebar (Start Menu) is visible, and the main content area displays market data. Red boxes and arrows highlight specific features:

- 1.** Hamburger icon in the top left corner of the Start Menu.
- 2.** 'Market Summary' tab in the top navigation bar.
- 3.** 'Indices' section in the main content area.
- 4.** 'S&P 500' index in the 'Indices' section.

The main content area displays the following data:

Index	Value	Gain	% Change
DJIA	42,539.89	234.41	0.55%
Nasdaq	19,421.45	178.85	0.93%
S&P 500	5,974.07	38.13	0.64%

The 'Indices' section also displays the following data:

Index	Price	1D Return	52-wk Range
Russell 2000	2,106.85	1.87%	1,760.71 - 2,448.96
Nasdaq 100	1,622.14	0.85%	1,122.60 - 2,072.30
Crude Oil	\$63.46	0.79%	57.02 - 84.06
S&P 500	5,974.07	0.64%	4,982.77 - 6,144.15
S&P 100	2,821.94	0.64%	2,371.14 - 3,096.50
DJIA	42,539.89	0.55%	37,645.60 - 45,014.00
S&P/TSX	26,441.39	0.20%	21,486.80 - 26,417.50
FTSE 100	8,787.02	0.15%	7,544.83 - 8,836.15
Gold	\$3,376.70	-0.87%	2,308.00 - 3,433.10
VIX	17.75	-4.31%	11.88 - 53.21

The 'Sectors' section displays the following data:

Sector	1D Return	52-wk Range
Energy	1.68%	\$103.06 - \$137.41
Technology	1.36%	\$451.00 - \$648.76
Basic Materials	0.99%	\$161.43 - \$215.82
Consumer Cyclical	0.94%	\$284.84 - \$402.25
Industrials	0.75%	\$213.26 - \$279.97
Healthcare	0.61%	\$234.11 - \$289.14
Financial Services	0.42%	\$97.83 - \$127.67
Utilities	0.20%	\$146.45 - \$179.70
Consumer Defensive	-0.15%	\$201.64 - \$226.64
Real Estate	-0.18%	\$76.92 - \$99.58
Communication Services	-0.26%	\$127.35 - \$169.43

The 'Market News' section displays the following news items:

- Trump to Sign Order Hiking Steel, Aluminum Tariffs to 50 Percent - Bloomberg.com**  
Google News - Today 1:54 pm  
Trump to Sign Order Hiking Steel, Aluminum Tariffs to 50 Percent - Bloomberg.com Trump to sign order doubling metals tariffs, White House says - Yahoo Finance Trump's 50% steel tariff could see prices tank in Europe — and soar in the U.S. - CNBC Opinion | America's New Steel Curtain WSJ As Courts Call Tariffs Into Question, Trump Again Turns to His Favorite Tool - The New York Times
- Nvidia Stock Gains, Surpasses Microsoft as Market's Most Valuable - Why Now - Barron's**

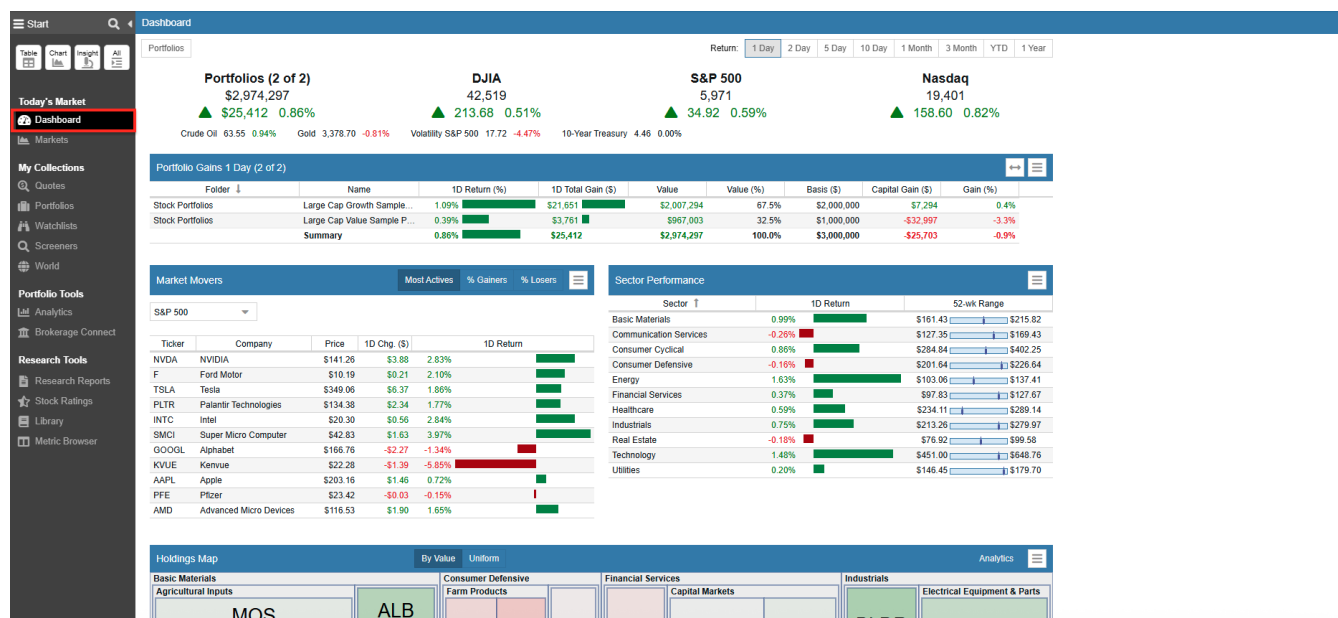
## Dashboard

### Overview

Located at the top of the Start Menu under **Today's Market**, the [Dashboard](#) offers a comprehensive snapshot of both your portfolio performance and the broader market.

The Dashboard includes of the following sections:

- [Portfolio Performance](#) – Displays performance at the portfolio level.
- [Holdings Performance Map](#) – Displays a heat map of holdings performance.
- [Markets Movers / Sector Performance](#) – Highlights top market movers and sector trends.
- [52 Week High and Lows](#) – Lists tickers reaching 52-week highs and lows within the selected index.
- [Portfolio Charting](#) – Graphs the value of your portfolio(s) over time, both in absolute terms and relative to benchmarks like the S&P 500.
- [Market News](#) – Displays the latest financial news and headlines.
- [Holdings Performance](#) – Breaks down performance at the individual position level.
- [Future Projected Income](#) – Shows expected income on a monthly, quarterly, and annual basis.
- [Earnings Calendar](#) – Displays when companies will report their earnings.

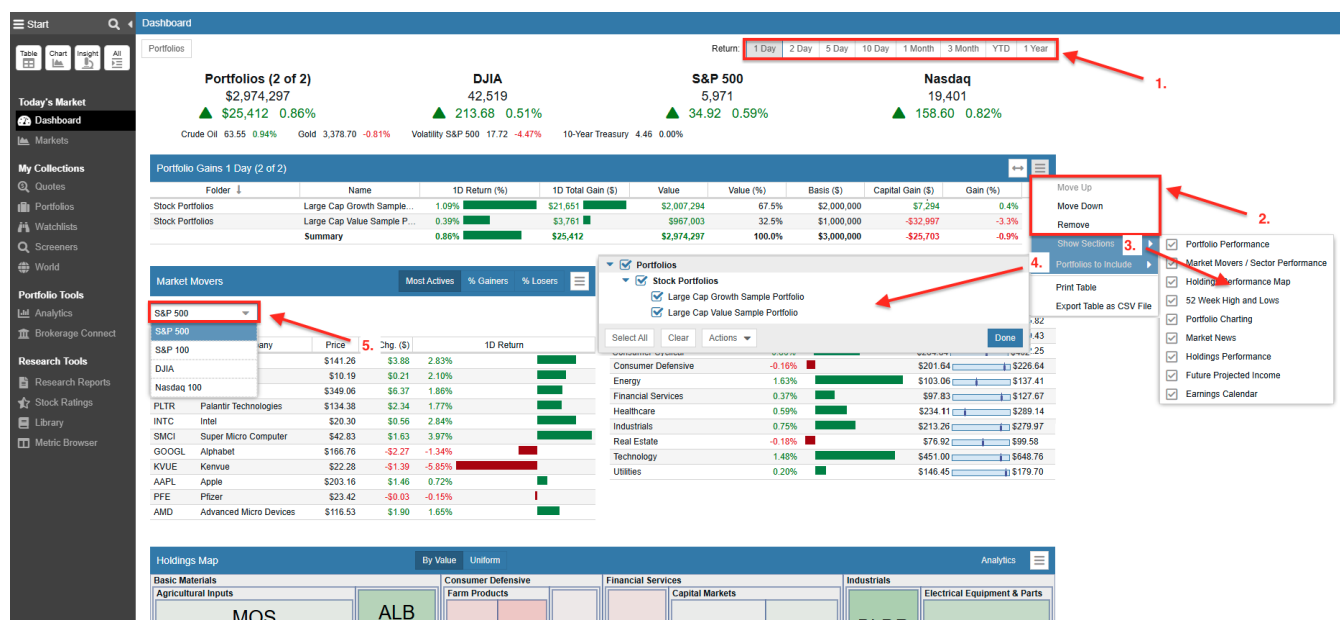


## Configuration

The Dashboard is completely configurable with sections that can be reordered, hidden, or modified.

For example, you can configure:

1. The Date selection for the performance overview of Portfolio(s) and the overall market.
2. Reorder or remove Sections.
3. Select Sections to display.
4. Select Portfolio(s) to include for performance evaluation.
5. Select the Index for Market Movers



The screenshot displays the Stock Rover Dashboard interface with several configuration points highlighted by red arrows and numbers:

- 1.** Points to the "Return" filter at the top right, which allows selecting the time period for performance analysis (1 Day, 2 Day, 5 Day, 10 Day, 1 Month, 3 Month, YTD, 1 Year).
- 2.** Points to the "Move Up", "Move Down", and "Remove" buttons in the right-hand sidebar, used for reordering or removing dashboard sections.
- 3.** Points to the "Show Sections" button in the right-hand sidebar, which opens a menu to select which sections are displayed.
- 4.** Points to the "Portfolios to Include" dropdown menu in the "Portfolios" section, used to select the specific portfolio(s) for evaluation.
- 5.** Points to the "S&P 500" dropdown menu in the "Market Movers" section, used to select the index for market movers.

The sections are uniquely configurable. The example below is showing how clicking on the hamburger in the Portfolio Charting section reveals configuration options such as selecting Benchmarks to add to the chart.



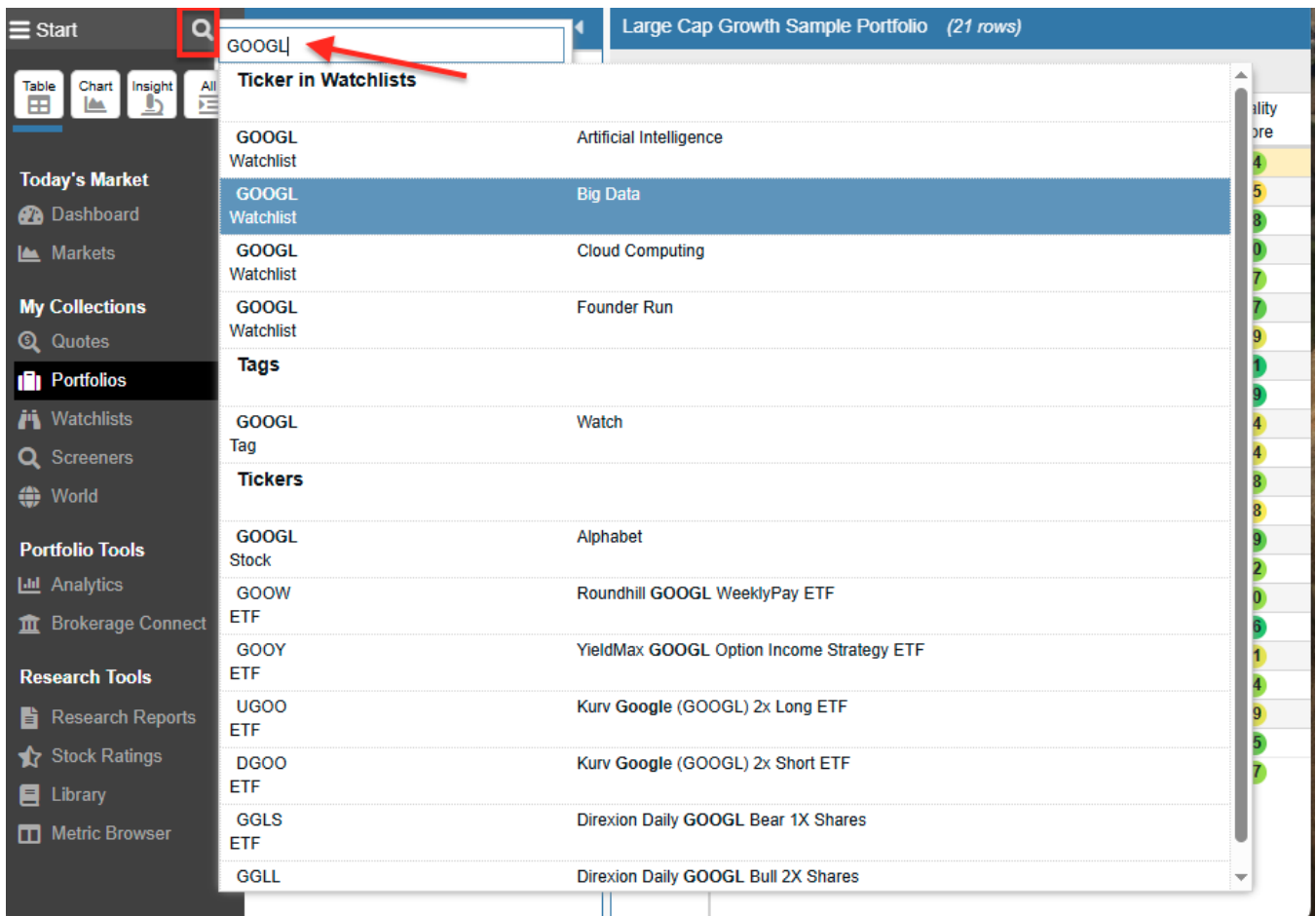


## Search

The [Search](#) magnifying glass icon at the top of the Start Menu provides you with easily searchable access to Stock Rover features, user creations such as portfolios, watchlists, and screeners, individual tickers, and more.

For example, you could search for metrics by name or description, and Stock Rover will return clickable shortcuts to where the metric(s) are referenced and displayed. In addition, a detailed listing of matching metrics with name and description are returned.

**Search** is a big time-saver, for example, you can also search for a specific ticker, Stock Rover will then display clickable shortcuts to the portfolios, watchlists and alerts associated with the ticker.



The screenshot shows the Stock Rover interface with a search bar at the top. A red box highlights the search icon, and a red arrow points to the search results. The search results are displayed in a table format, showing various watchlists and tags associated with the ticker 'GOOGL'.

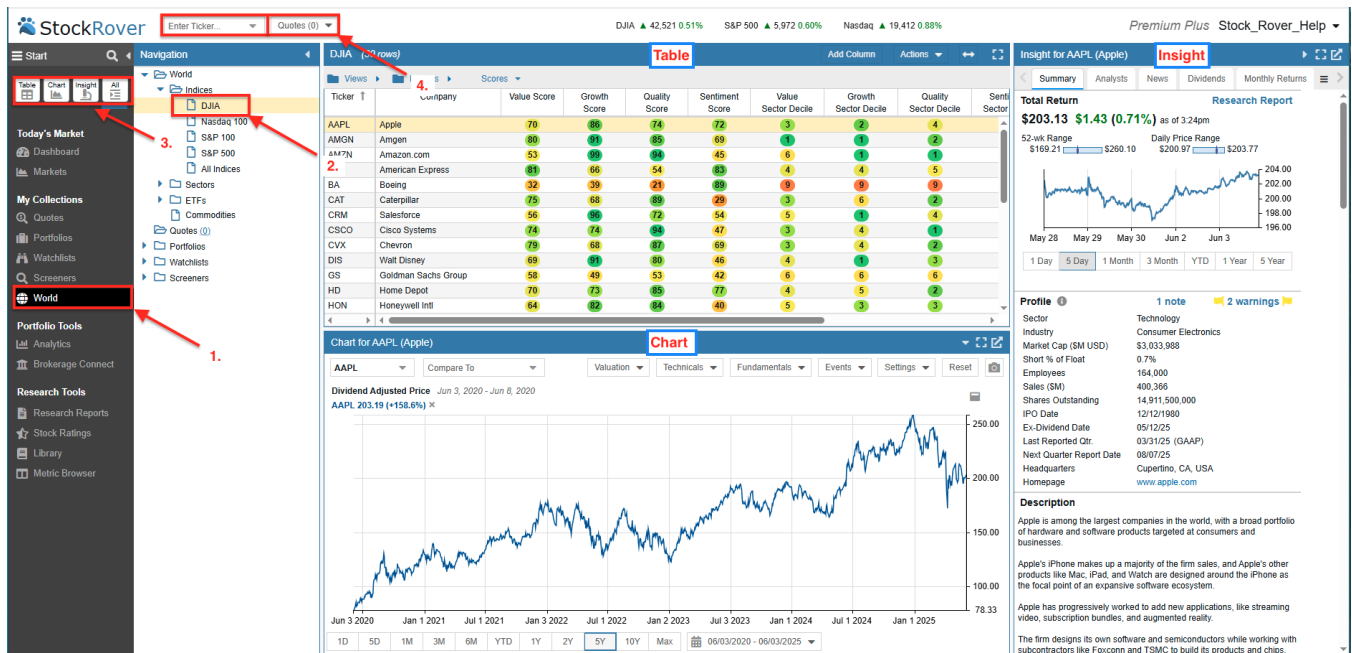
Ticker in Watchlists	
GOOGL Watchlist	Artificial Intelligence
GOOGL Watchlist	Big Data
GOOGL Watchlist	Cloud Computing
GOOGL Watchlist	Founder Run
<b>Tags</b>	
GOOGL Tag	Watch
<b>Tickers</b>	
GOOGL Stock	Alphabet
GOOW ETF	Roundhill GOOGL WeeklyPay ETF
GOOY ETF	YieldMax GOOGL Option Income Strategy ETF
UGOO ETF	Kurv Google (GOOGL) 2x Long ETF
DGOO ETF	Kurv Google (GOOGL) 2x Short ETF
GGLS ETF	Direxion Daily GOOGL Bear 1X Shares
GGLL	Direxion Daily GOOGL Bull 2X Shares

## Navigation

## My Collections

**My Collections** is where you perform research on a ticker or set of tickers.

1. You select what you are interested in researching from the **My Collections**, by selecting either **Quotes**, **Portfolios**, **Watchlists**, **Screeners**, or **World**.
2. The Navigation panel will then populate with selections. In our example, we've clicked on **World**, and selected **DJIA** to research the tickers of the Dow Jones Industrial Average.
3. Layouts – Tells Stock Rover how the research results are to be laid out – whether to display the **Table**, the **Chart**, the **Insight** Panel, or **All** three layouts.
4. **Enter Ticker** – Is where you can input tickers that you would like to research on an ad hoc basis. You can manage these tickers via the [Quotes](#) feature.



Below is another example, where we are researching the tickers that comprise a Portfolio.

1. Select **Portfolios** under My Collections.
2. **Navigation** – Is populated with portfolios, we then select a portfolio called **Large Cap Growth Sample Portfolio**.
3. We'll display the research results using **All** layouts.
4. **Right-Click** – This pane appears when you right-click on a Portfolio, Watchlist, or Screener in the Navigation Panel, and provides quick access to commonly used functions for each.



## Layouts

Layouts determine how your research results are arranged or *laid out* in Stock Rover.

**Table** – Provides a flexible spreadsheet–like paradigm for viewing tickers and their data. Selecting a ticker in the Table updates both the Chart and Insight Panel with data for the ticker.

**Chart** – Here you can chart price, chart over 100 fundamentals, chart key technical indicators, and much more.

**Insight Panel** – Contains tools for researching a ticker in depth.

The Layout options are configured via the icons in the **Start Menu**.

1. **Table** – displays only the Table.
2. **Chart** – displays only the Chart.
3. **Insight** – displays only the Insight Panel.
4. **All** – displays the Table, Chart, and Insight all together.
5. You can also collapse, expand, or detach a layout.

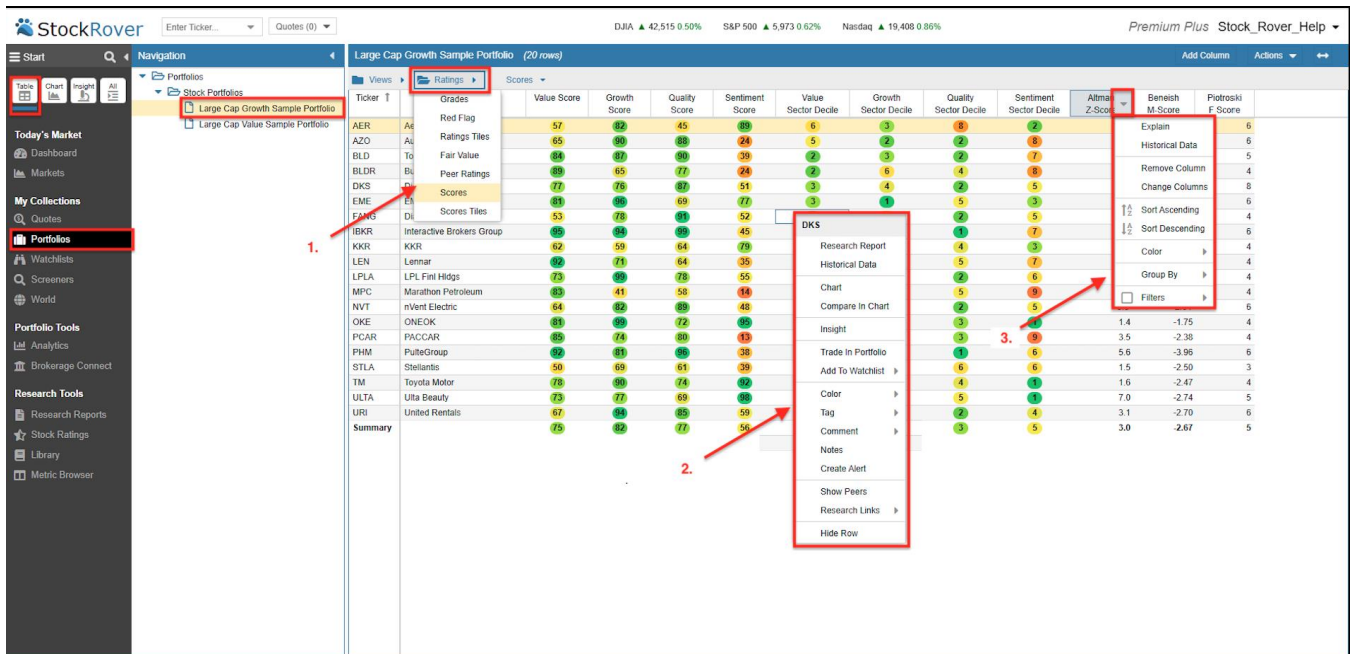


## Table

The [Table](#) is populated based on what you select in the Navigation Panel. In our example, the Table's rows are populated with the 20 tickers that comprise the "Large Cap Growth Sample Portfolio".

The Table compares investment opportunities across many dimensions of financial, operational, and price performance. It uses a spreadsheet-like paradigm where the spreadsheet is populated with lots of highly specialized financial data.

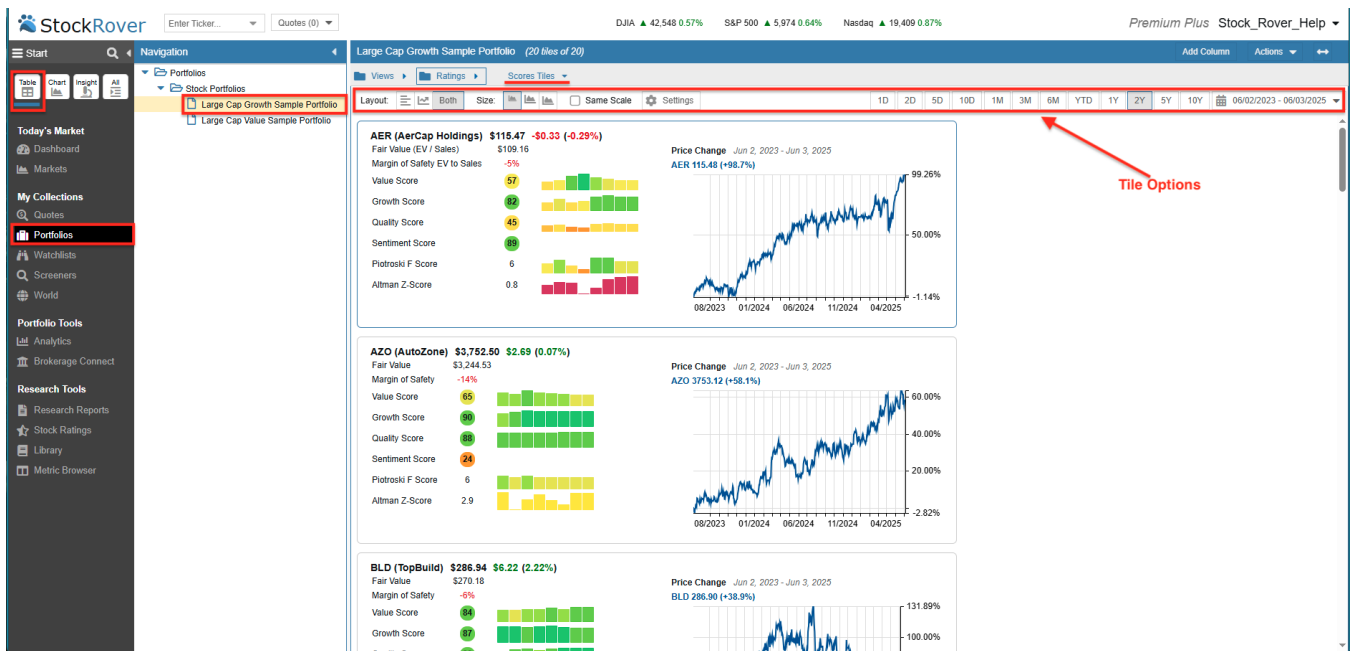
1. The Table is comprised of [Views](#) which are logically organized into folders. Views are analogous to spreadsheet workbooks. Each View is displaying a different set of metrics as columns. We've selected the "Scores" view from the Ratings folder.
2. You can refine the data display by right-clicking on a row, for row options.
3. You can also right-click on a column, for column options.



The screenshot displays the Stock Rover interface. The top header shows market indices: DJIA ▲ 42,515 0.50%, S&P 500 ▲ 5,973 0.62%, and Nasdaq ▲ 19,408 0.86%. The navigation panel on the left includes sections like 'Today's Market', 'My Collections', 'Portfolio Tools', and 'Research Tools'. The main table area is titled 'Large Cap Growth Sample Portfolio (20 rows)'. It features a 'Views' dropdown menu with 'Ratings' selected, showing a 'Scores' view. The table columns include Ticker, Grades, Value Score, Growth Score, Quality Score, Sentiment Score, Value Sector Decile, Growth Sector Decile, Quality Sector Decile, Sentiment Sector Decile, Altman Z-Score, Beneish M-Score, and Piotroski F-Score. A right-click context menu is open over the 'DKS' row, showing options like 'Research Report', 'Historical Data', 'Chart', 'Compare In Chart', 'Trade In Portfolio', 'Add To Watchlist', 'Color', 'Tag', 'Comment', 'Notes', 'Create Alert', 'Show Peers', 'Research Links', and 'Hide Row'. Another right-click context menu is open over the 'Altman Z-Score' column, showing options like 'Explain', 'Historical Data', 'Remove Column', 'Change Columns', 'Sort Ascending', 'Sort Descending', 'Color', 'Group By', and 'Filters'.

The Table is also configured with Tile Views, which are Views that display tabular and graphical data together. Below we selected the “Scores Tiles” View which is showing both Scoring and the price change over 2 years for each ticker in the portfolio.

Tile Views also come with additional configuration options along the top.



## Chart

The [Chart](#) allows you to chart price, chart over 100 fundamentals, and chart key technical indicators. You can use the chart to baseline stocks for easy relative performance comparison. You can also chart macro entities such as Portfolios, Screeners, and Watchlists.

1. When a row is selected from the Table, the corresponding ticker is charted. We have selected the ticker DKS from the Table.
2. You can add more tickers or benchmarks to the current chart.
3. The Chart comes with many configuration options, where you can pick from a broad list of technicals, fundamentals, events, and much more.
4. You can chart based on preset date ranges, or you can enter a custom date range.



## Insight

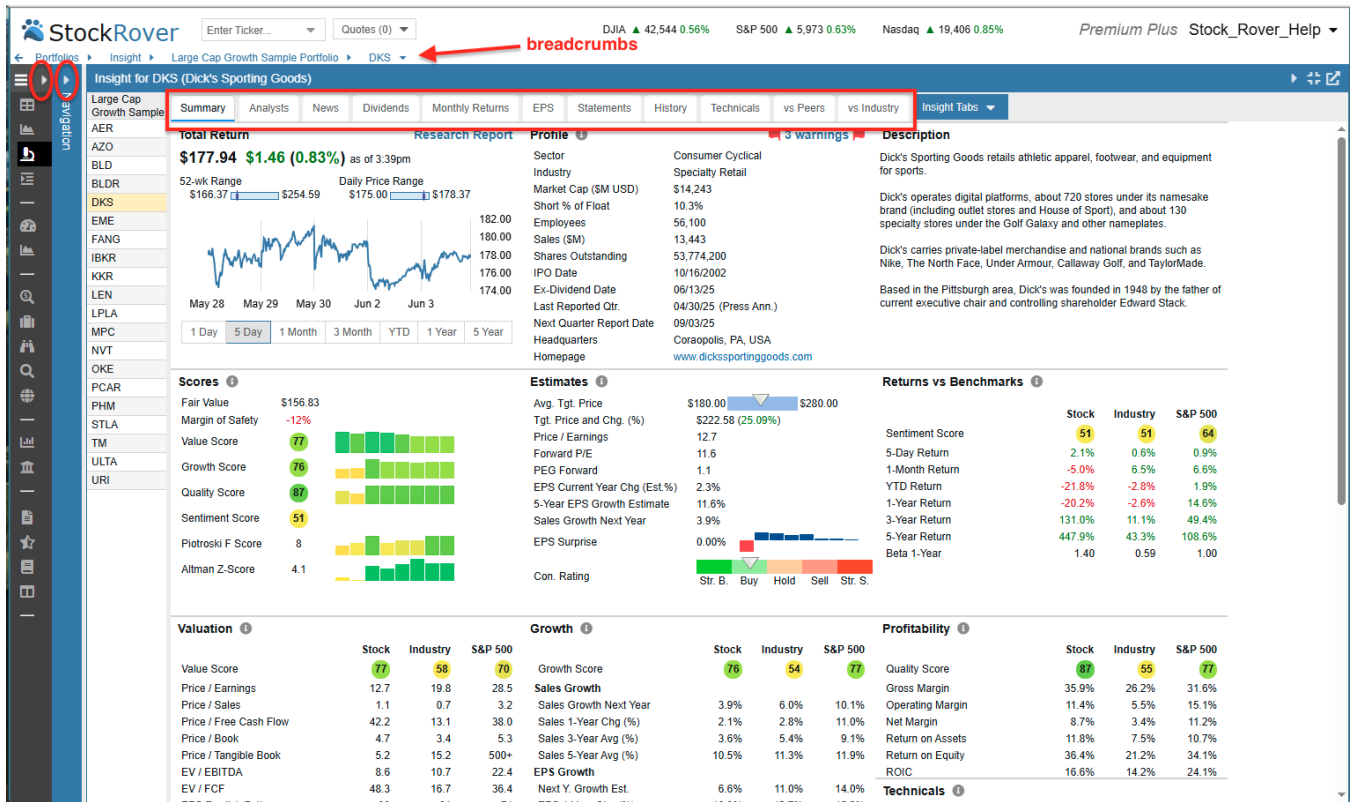
The [Insight](#) Panel offers a comprehensive set of tools for conducting in-depth research on a selected stock. When a row is selected in the Table (for example, DKS), the corresponding data is automatically loaded into the Insight Panel.

In the example below, both the Start Menu and Navigation Panel have been collapsed to maximize screen space. Note the breadcrumb trail at the top of the screen—clicking on these breadcrumbs enables quick and easy navigation within Stock Rover.

The Insight Panel is divided into the following tabs:

1. **Summary** – Provides a snapshot of key company information.
2. **Analysts** – Displays analyst ratings and earnings estimates.
3. **News** – Lists relevant news headlines and updates.
4. **Dividends** – Shows the company's dividend payment history.
5. **Monthly Returns** – Highlights the seasonality of a stock, ETF, or fund.
6. **EPS** – Tracks sales, earnings per share (EPS), and cash flow trends.
7. **Statements** – Contains detailed financials, including income statements, balance sheets, and cash flow statements.
8. **History** – Summarizes the company's past performance.
9. **Technicals** – Displays key technical indicators and signals.
10. **vs Peers** – Offers side-by-side comparisons with similar companies.
11. **vs Industry** – Presents metrics comparing a stock to its industry and the S&P 500.



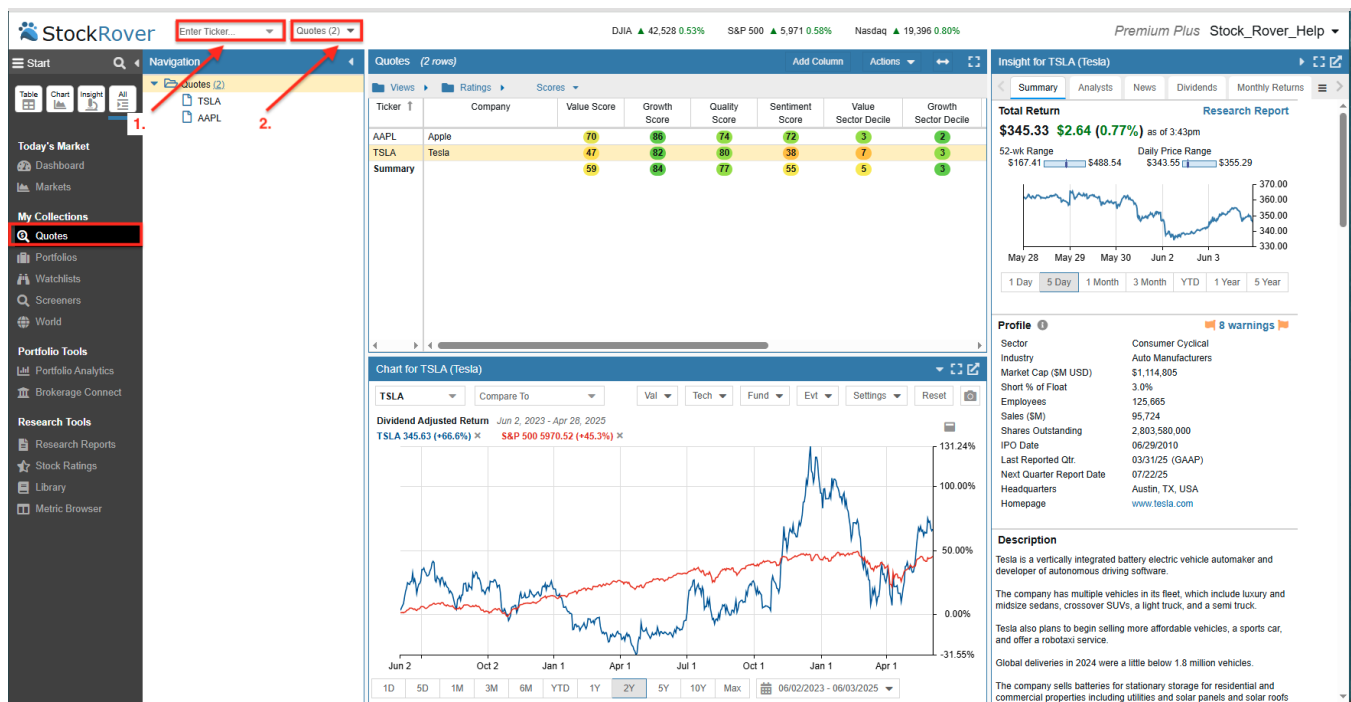


## Quotes

[Quotes](#) is where you manage your Quote List—a space to hold tickers you're interested in exploring without adding them to a watchlist or portfolio. Think of it as a staging area for your short-term research.

You can add tickers using the **Enter Ticker** box, and access your Quotes List any time via the **Quotes** option under *My Collections*

1. **Enter Ticker** – Tickers entered here are added to both the Quotes list and the Table view.
2. **Quotes** – Lets you manage your Quote List, including restoring recently deleted tickers.



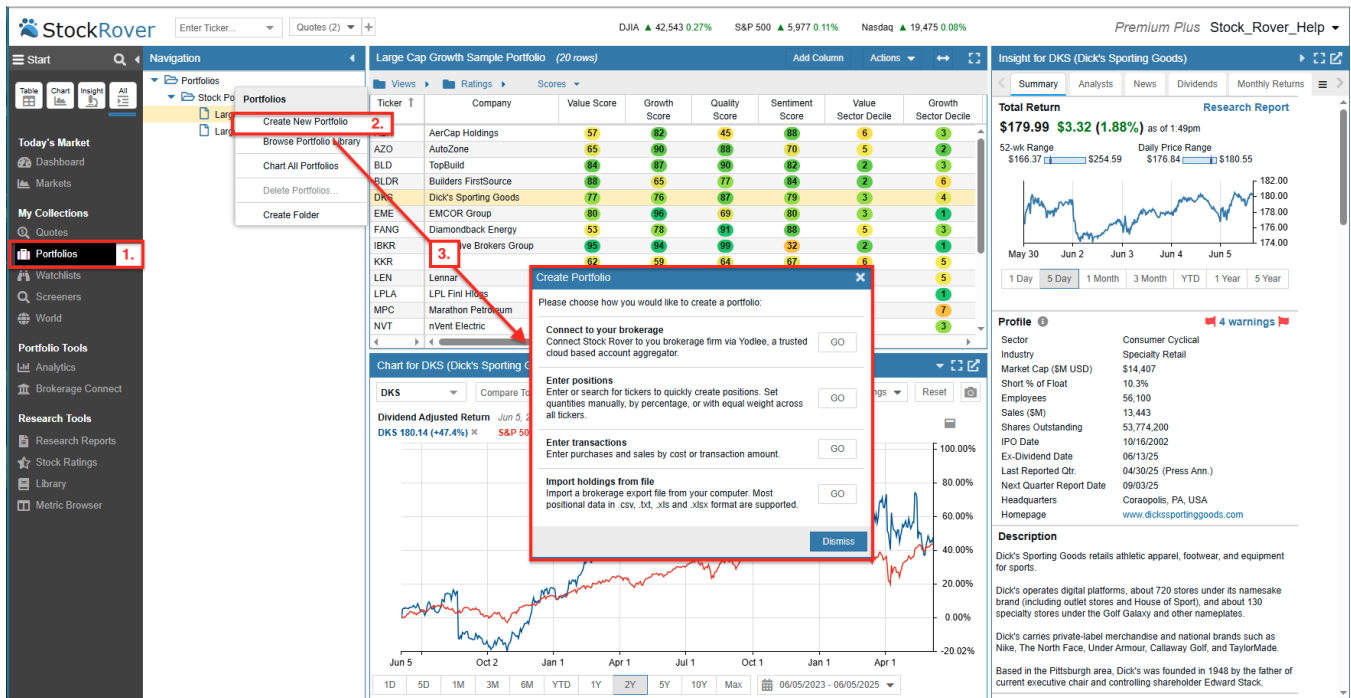
## Portfolios, Watchlists, and Screeners

You can readily create, modify, or delete your [Portfolios](#), [Watchlists](#), and [Screeners](#).

Management functions are accessed via [right-clicking](#) in the Navigation Panel.

For example, to create a portfolio:

1. Click on **Portfolios** in the Start Menu.
2. Right-click on **Portfolios** in the **Navigation Panel** and select **Create a New Portfolio**
3. You can now select how you'd like to [Create Portfolio](#).



The screenshot displays the Stock Rover web application interface. On the left, the 'Start' menu has 'Portfolios' highlighted with a red box and labeled '1.'. In the 'Navigation Panel', 'Portfolios' is right-clicked, and a context menu is shown with 'Create New Portfolio' highlighted by a red box and labeled '2.'. A red arrow points from this menu item to a 'Create Portfolio' dialog box that is open in the center. This dialog box, labeled '3.', offers three methods for creating a portfolio: connecting to a brokerage, entering positions manually, or importing holdings from a file. The background shows a 'Large Cap Growth Sample Portfolio' table with columns for Ticker, Company, Value Score, Growth Score, Quality Score, Sentiment Score, Value Sector Decile, and Growth Sector Decile. A chart for DKS (Dick's Sporting Goods) is visible at the bottom, and a 'Research Report' for DKS is on the right.

## Tracking Portfolio Performance

Stock Rover provides a comprehensive set of tools to manage and track your portfolios effectively. When the Start Menu is in "Simple" mode, it highlights two core functionalities:

1. [Portfolio Analytics](#) – Analyze the performance of your portfolios.
2. [Brokerage Connect](#) - Configure Stock Rover to connect to Your brokerage firm(s).

### Brokerage Connect

In order to analyze portfolio performance, you first have to get your portfolio details into Stock Rover. The quickest way to accomplish this, is by linking a Stock Rover portfolio to a brokerage portfolio via [Brokerage Connect](#).


Note: If you don't want to use Brokerage Connect to link Stock Rover to your brokerage, or if the brokerage for some reason is not supported, you can always opt to maintain a [manual portfolio](#).

When you connect via Brokerage Connect, a read-only data feed is established to your brokerage firm(s) via [Yodlee](#), a trusted cloud-based account aggregator.

**Interactive Brokers Users:** [Click here for connection instructions](#).

The details for each portfolio are then synchronized in Stock Rover. In addition to being updated nightly, an update is initiated whenever you log in.

When you select "Brokerage Connect" from the Start Menu, you will be presented with the Terms of Service.






DUJA ▲ 42.543 0.27%
S&P 500 ▲ 5.977 0.11%
Nasdaq ▲ 19.475 0.08%

Premium Plus
Stock\_Rover\_Help

Start
Today's Market
My Collections
Portfolio Tools
Research Tools

Brokerage Integration Terms of Service

Brokerage integration lets you sync Stock Rover portfolios with real portfolios from your brokerage.



You will need to provide your brokerage login information to a trusted third party during the initial setup. Stock Rover will then be able to synchronize changes in your portfolio. Stock Rover never has access to your actual account credentials.

**Interactive Brokers Users READ THIS**  
If you would like to connect to Interactive Brokers we provide an alternate direct feed for this brokerage. Interactive Brokers users should email [reportingintegration@interactivebrokers.com](mailto:reportingintegration@interactivebrokers.com). Be sure to include your account number, and request a Stock Rover feed.

In order to use Stock Rover brokerage account integration, you must accept the following terms:

**TERMS OF USE**

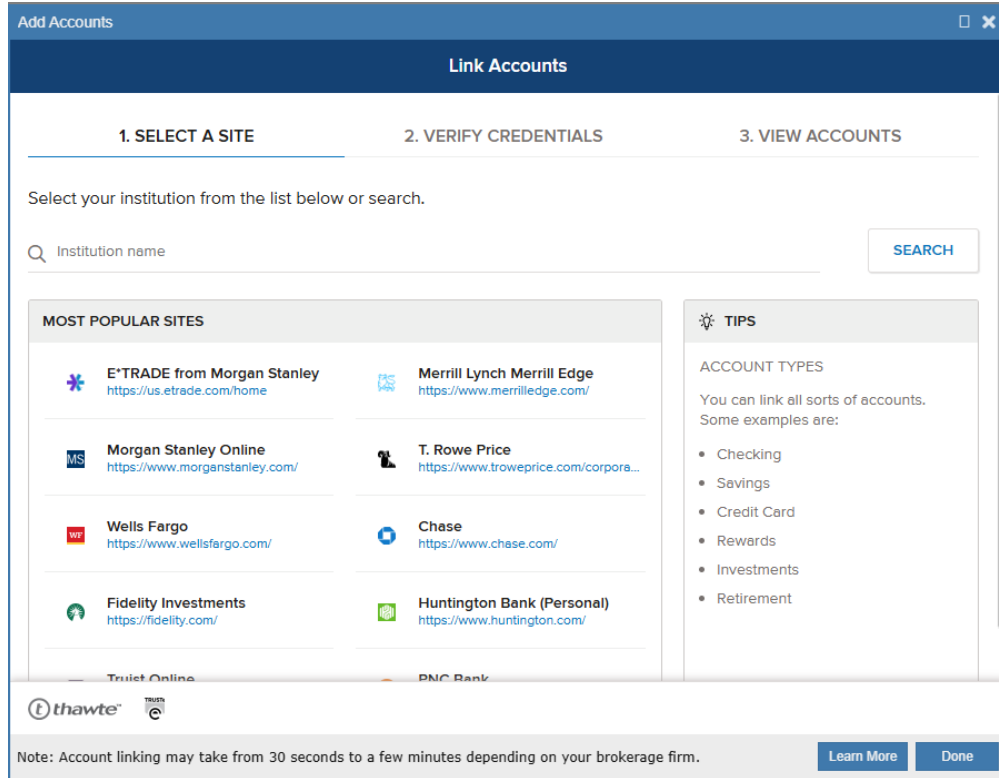
**Provide Accurate Information**  
You, the end user, agree to provide true, accurate, current and complete information about yourself and your accounts maintained at other web sites and you agree to not misrepresent your identity or your account information. You agree to keep your account information up to date and accurate.

**Proprietary Rights**  
You are permitted to use content delivered to you through the service only on the service. You may not copy, reproduce, distribute, or create derivative works from this content. Further, you agree not to reverse engineer or reverse compile any of the service technology, including but not limited to, any Java applets associated with the service.

**Content You Provide And Is Derived by Use of the Service**  
You are licensing to Stock Rover ("Company") and its service providers ("Service Provider") any information, data, passwords, materials or other content (collectively, "Content") you provide through or to the service. Company and Service Provider may use, modify, display, distribute and create new material using such Content to provide the service to you. Company and Service Provider may also use, sell, license, reproduce, distribute and disclose aggregate, non-personally identifiable information that is derived through your use of the Service. By submitting Content, you automatically agree, or promise that the owner of such Content has expressly agreed that, without any particular time limit, and without the payment of any fees, Company and Service Provider may use the Content for the purposes set out above. As between Company and Service Provider, Company owns your confidential account information.

Third Party Accounts

After accepting the Terms of Service, you'll be connected to the Yodlee interface, where you'll be able to search for your brokerage account.



You'll follow the prompts to enter your account login information. Once the connection has been verified, you'll see the Brokerage Connections Panel in Stock Rover.

By default, the portfolios that appear in the Brokerage Connections panel will be linked to a Stock Rover portfolio with the legal name of the portfolio as it appears in the brokerage account.

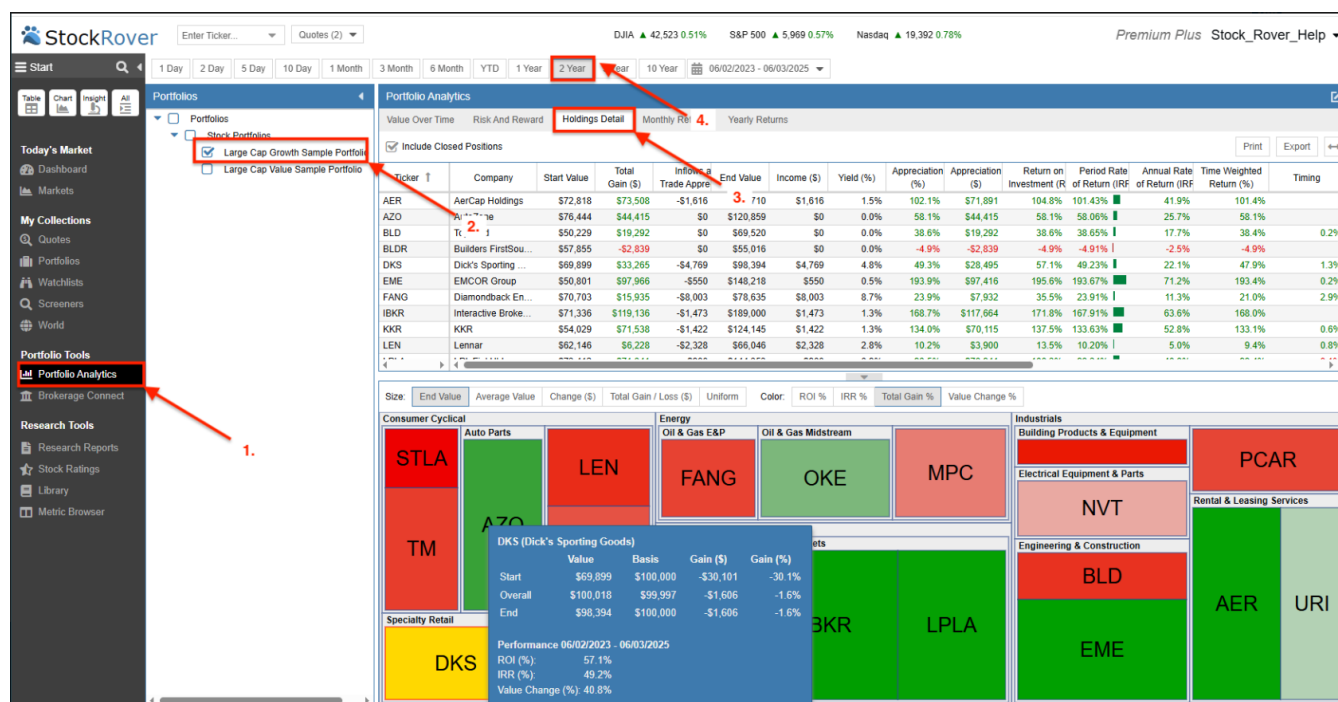
Below is an example of a brokerage account connection with a single portfolio.

Brokerage Connections		
<div>Add Account   Refresh All</div>		
✓	<b>Fidelity Investments</b> 05/26/21 1:27pm	⚙
●	Joint Linked to Fidelity Investments - Joint ▾	Last Trade: May. 26, 2021 ⚙

## Portfolio Analytics

The [Portfolio Analytics](#) tool provides a deep dive into portfolio performance, including insights into the individual holdings. It features five tabs at the top for detailed analysis: Value Over Time, Risk and Reward, Holdings Detail, Monthly Returns, and Yearly Returns. You can analyze portfolio(s) that are linked to brokerage(s) as well as portfolio(s) that are [maintained manually](#) in Stock Rover.

1. Select **Portfolio Analytics** from the Start Menu.
2. Pick the portfolio(s) to analyze.
3. Select the appropriate report.
4. Enter a date range.



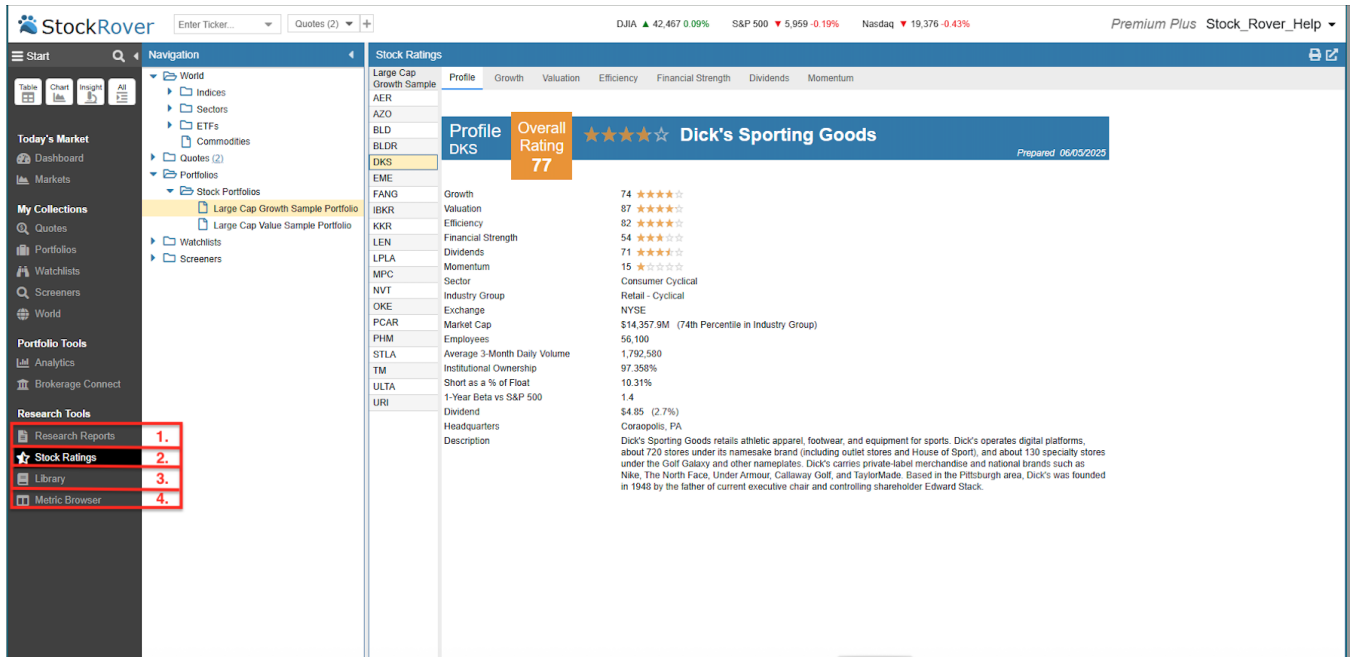


## Research Tools

### Overview

This group of tools further extends Stock Rover's research capabilities.

1. [Research Reports](#) – Generates a report on demand, using current data to deliver a real-time snapshot of a company's financial health, industry context, and key metrics.
2. [Stock Ratings](#) – The facility provides investors with a simple overall percentile rank of a company within an industry group.
3. [Library](#) – Contains a variety of screeners, model portfolios, watchlists, views, visuals, and metric packages that can be imported for use.
4. [Metric Browser](#) – A fast and easy way to see all the metrics available in Stock Rover.

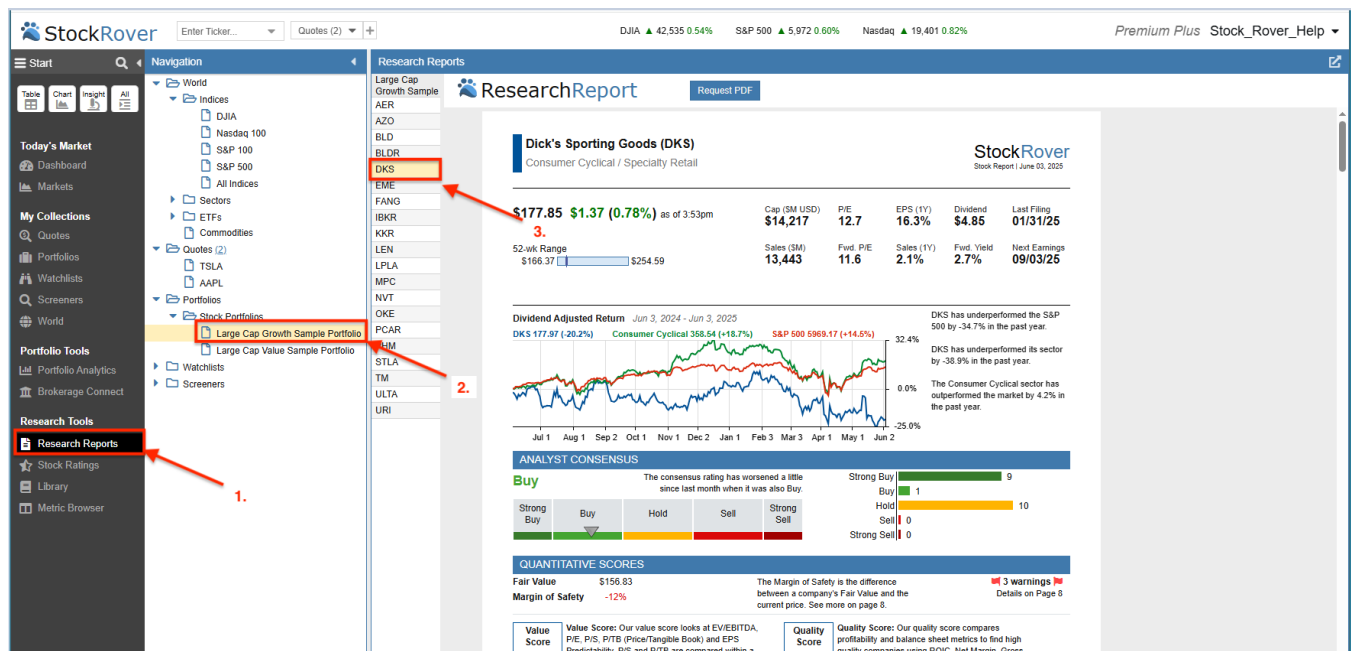


The screenshot displays the Stock Rover web application. On the left sidebar, under the 'Research Tools' section, four items are listed and numbered: 1. Research Reports, 2. Stock Ratings, 3. Library, and 4. Metric Browser. The main content area shows the 'Stock Ratings' page for 'Dick's Sporting Goods' (DKS). The page includes a 'Profile' tab, an 'Overall Rating' of 77 (represented by five stars), and various financial and performance metrics such as Growth, Valuation, Efficiency, Financial Strength, Dividends, and Momentum. A detailed description of the company is provided at the bottom.

## Research Reports

**Research Reports** offer a comprehensive, on-demand 8-page analysis for any of the 7,000+ stocks tracked by Stock Rover on U.S. and Canadian exchanges. Each report is generated using current data, providing a real-time snapshot of a company's financial health, industry context, and key metrics. Reports can be viewed in your browser or downloaded as a PDF for easy sharing and portability.

1. Select **Research Reports** from the Start Menu.
2. Select a data set in the Navigation Panel.
3. Select a ticker to report.

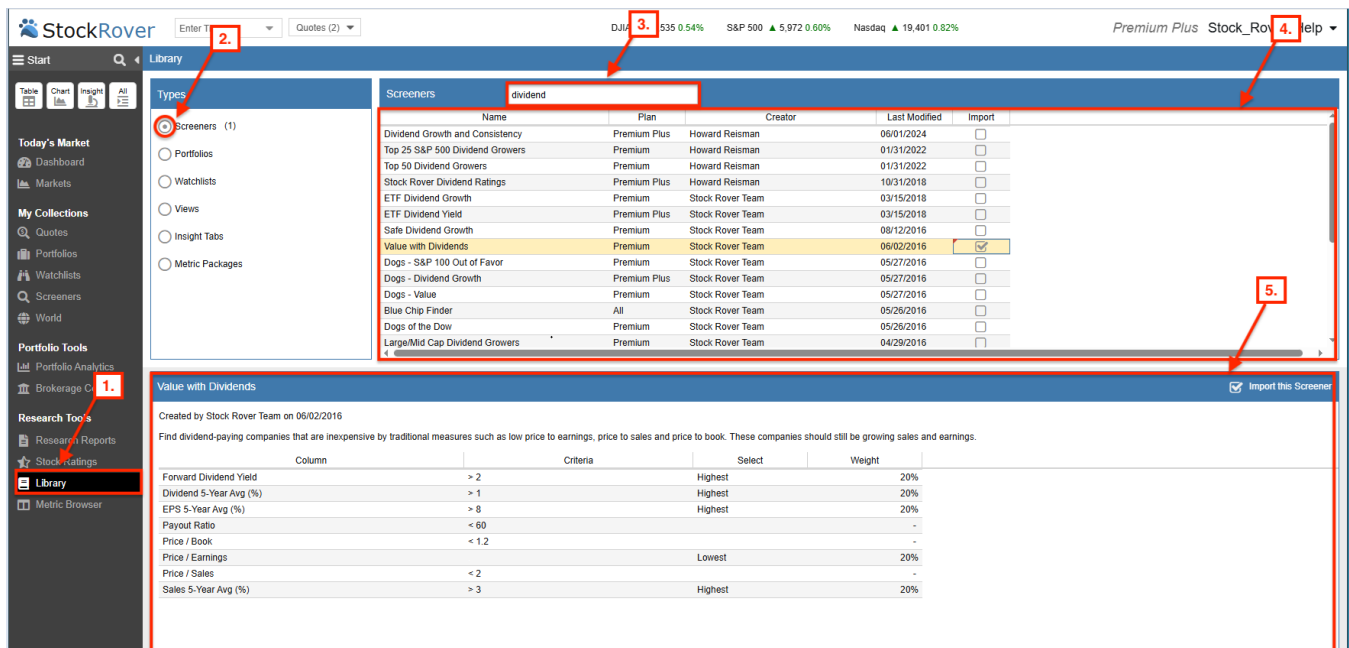


## Library

The [Library](#) is a repository for a variety of different investment research resources that you can import into your Stock Rover account for your own investment research use. The library contains a variety of screeners, model portfolios, watchlists, views, visuals and metric packages.

In the example below, we are searching the Library for Dividend Screeners

1. Select **Library** from the Start Menu
2. We'll choose Screeners.
3. Enter "dividend" in the search box.
4. The Screeners pane returns a list of matching screeners.
5. When we select a screener to import, a description along with the criteria is displayed.



The screenshot shows the Stock Rover Library interface. The search bar at the top contains the text "dividend". The sidebar on the left has the "Library" option selected. The main panel displays a list of screeners, with "Value with Dividends" highlighted. Below the list, the details for "Value with Dividends" are shown, including a description and a table of criteria.

Column	Criteria	Select	Weight
Forward Dividend Yield	> 2	Highest	20%
Dividend 5-Year Avg (%)	> 1	Highest	20%
EPS 5-Year Avg (%)	> 8	Highest	20%
Payout Ratio	< 60		-
Price / Book	< 1.2		-
Price / Earnings		Lowest	20%
Price / Sales	< 2		-
Sales 5-Year Avg (%)	> 3	Highest	20%