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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.

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Start Menu

All of Stock Rover's features and capabilities are accessible from the vertical **Start Menu** located on the left side of the screen.

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

1. **Today's Market** – provides us with a performance overview of our portfolios as well as the overall market.

2. **My Collections** – this is where we perform research on the tickers that comprise our Portfolios, Watchlists, and Screeners. Under "World" we can select entire Indices, Sectors, ETFs, Commodities, and more. We can also create, modify, or delete Portfolios, Watchlists, and Screeners.

3. **Portfolio Tools** – these tools enable us 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 –** these tools and resources deliver more research capabilities.

5. **My Bookmarks** – we can customize the Start Menu with the parts of Stock Rover that we use most often and want quick access to.

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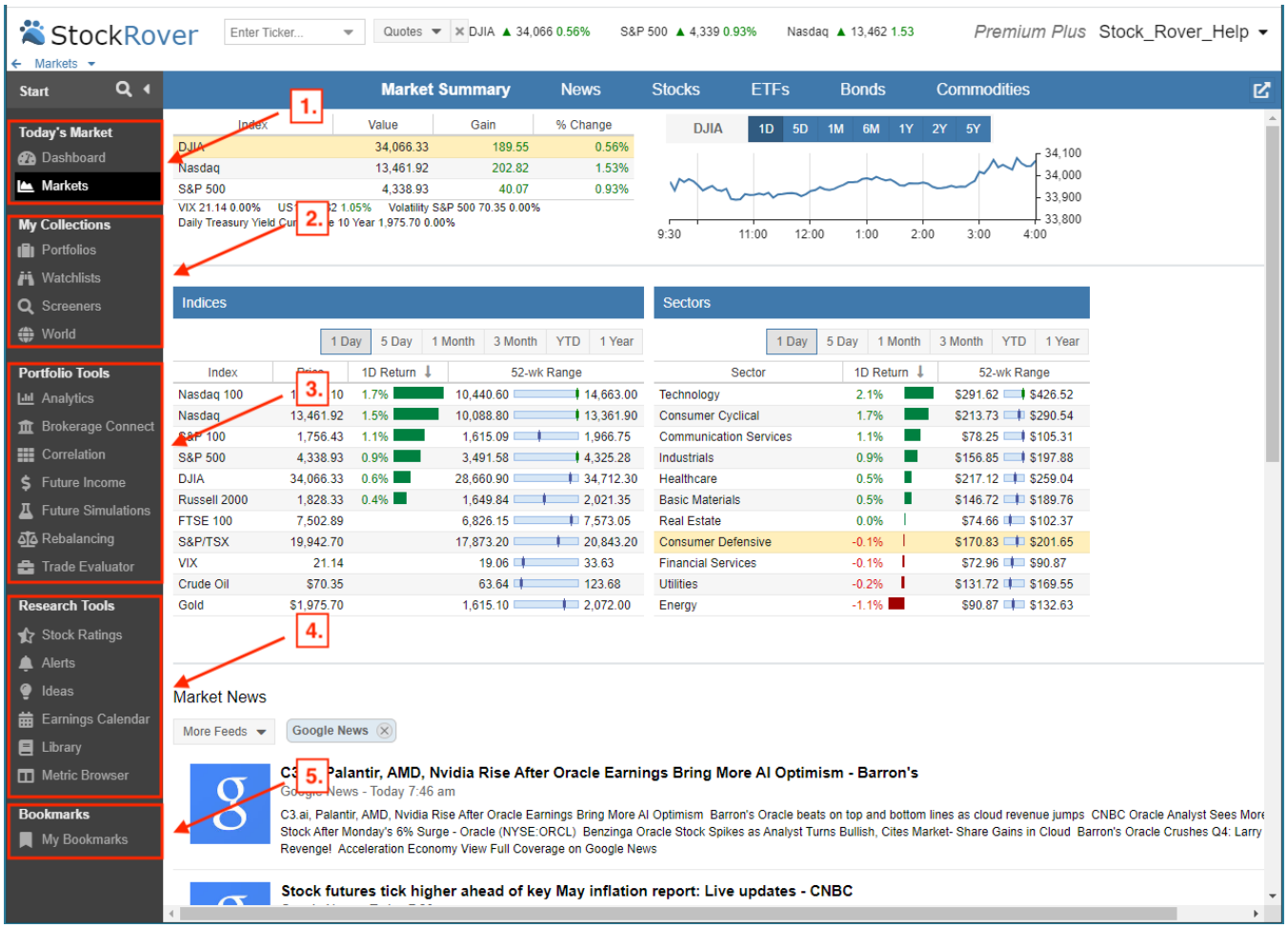

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Dashboard

Overview

The **Dashboard** is located at the top of the **Start Menu** under Today's Market and provides a performance overview for your portfolios and as well as the overall market.

The Dashboard consists 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 – Displays market movers and sector performance.
- 52 Week Highs and Lows – Displays the tickers hitting their 52 week high and hitting their 52 week low for the selected index.
- Market and Portfolio News – Displays the latest news.
- Portfolio Charting – Displays the performance of your portfolio(s) both on an absolute basis, and vs. key benchmarks such as the S&P 500. Charts the value of your portfolio(s) over time.
- Current Holdings – Displays portfolio performance at the position level.
- Future Projected Income – Displays the expected monthly, quarterly and yearly future income.
- Earnings Calendar – Displays when companies will report their earnings.

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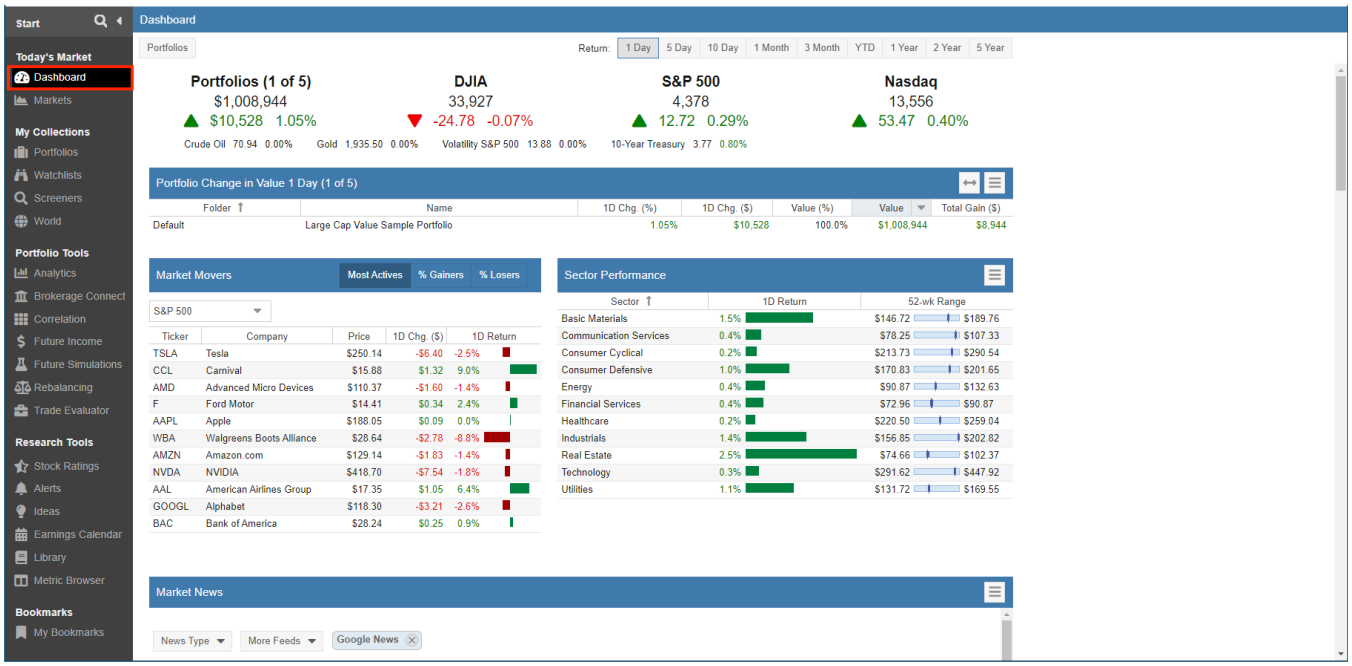

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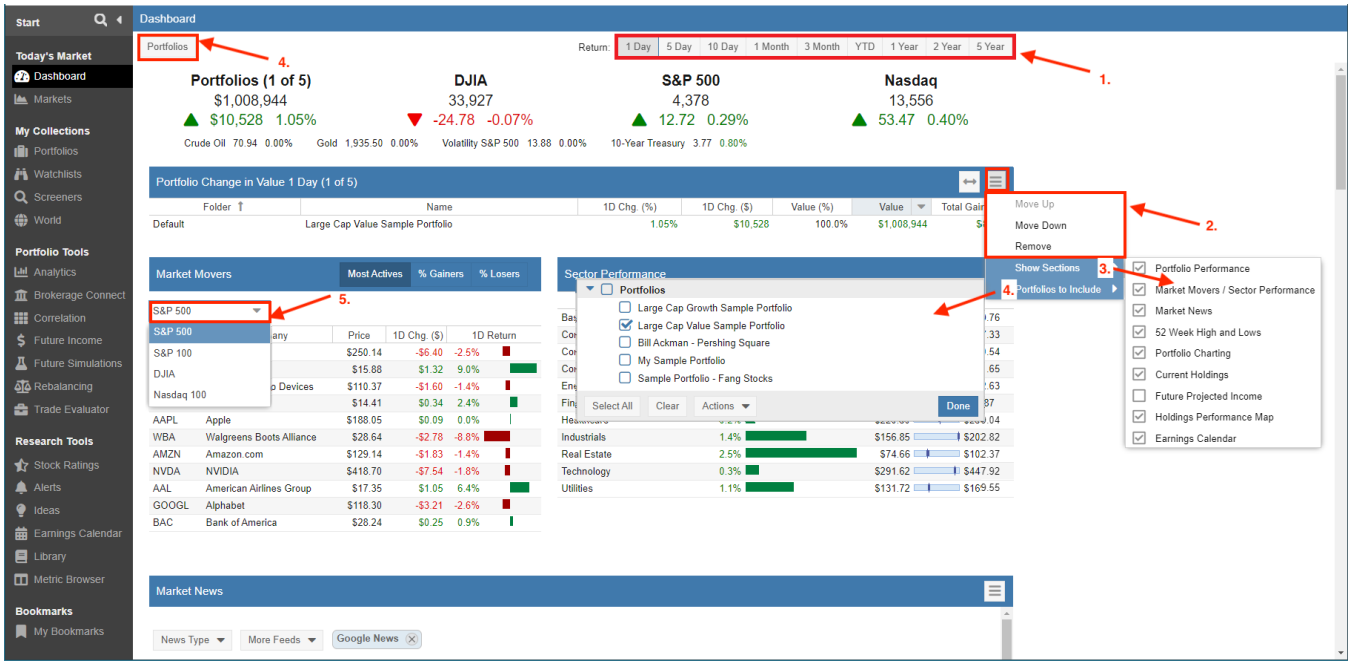
Configuration

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

For example, we 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



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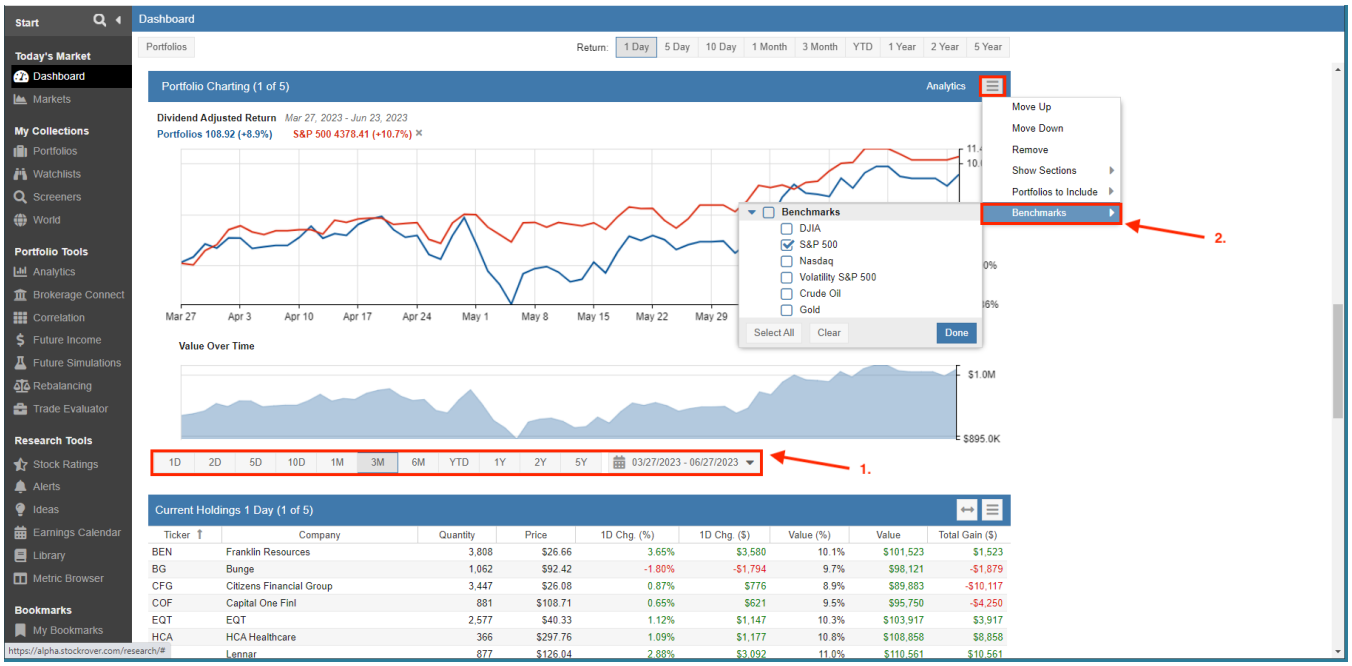
The sections are uniquely configurable. The example below is showing how clicking on the hamburger in the Portfolio Charting section reveals configuration options.

1. Date selection for portfolio(s) performance.
2. Select Benchmarks to add to the chart.



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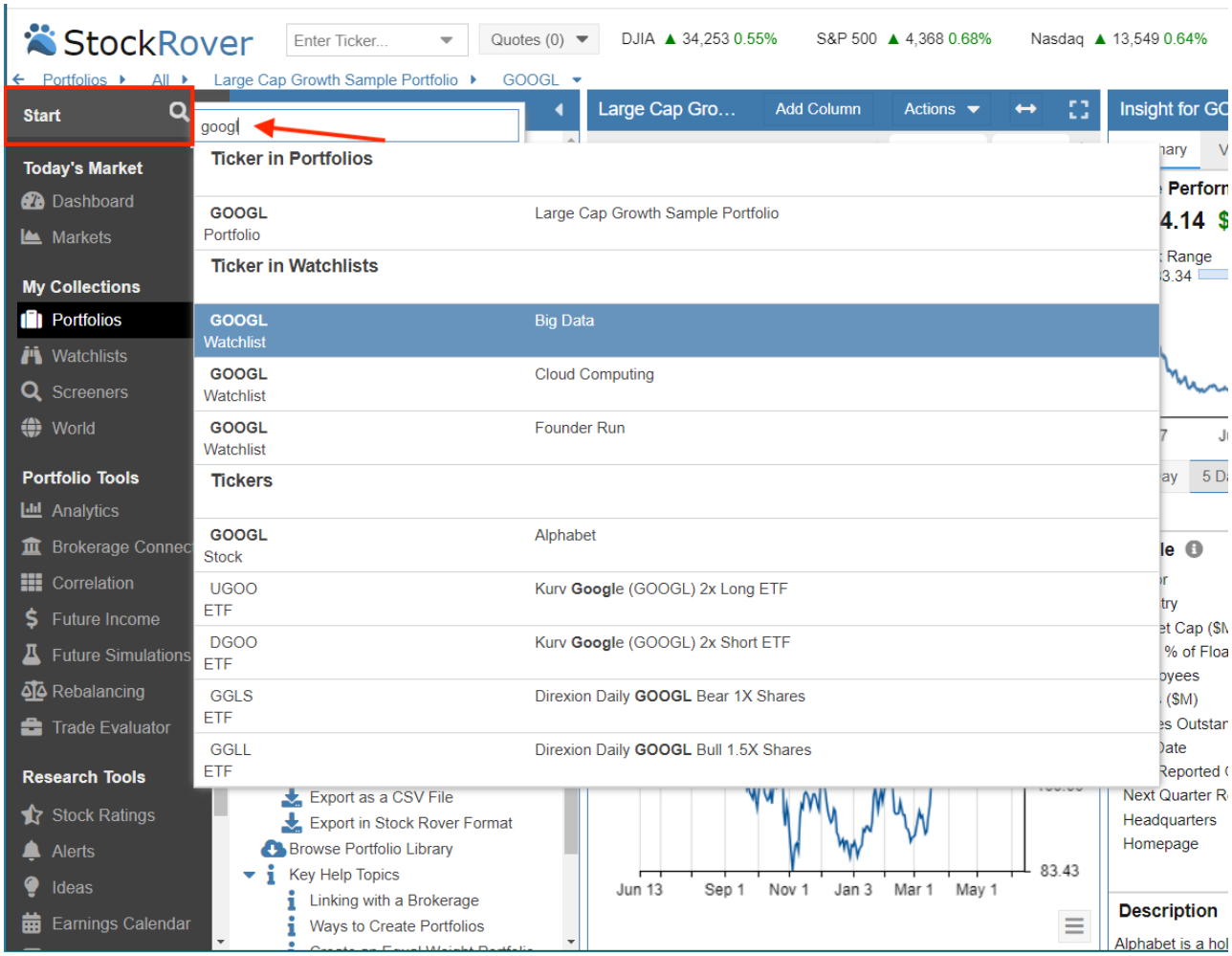
Search

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

For example, we 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, we can also search for a specific ticker, Stock Rover will then display clickable shortcuts to the portfolios, watchlists and alerts associated with the ticker.



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Navigation

My Collections

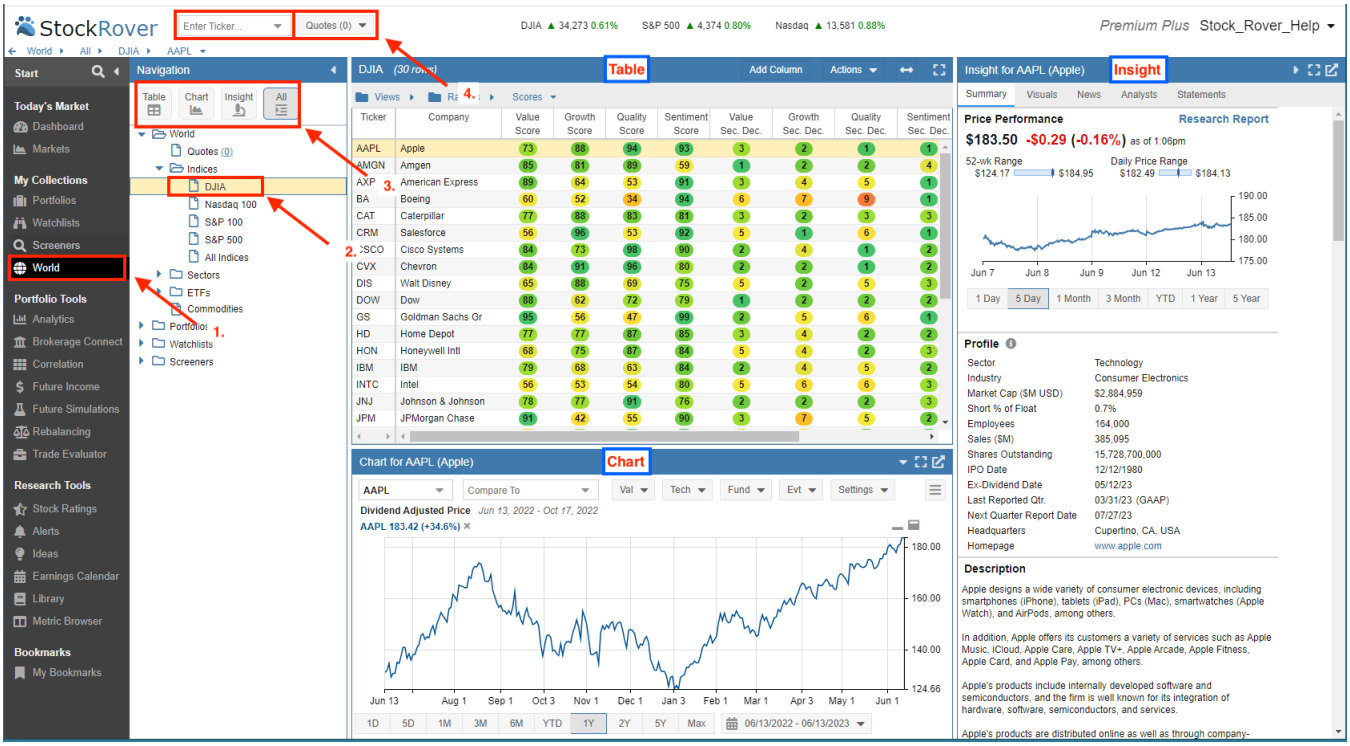
My Collections is where we perform research on a ticker or set of tickers.

1. We select what we are interested in researching from the **My Collections**, by selecting either **Portfolios, Watchlists, Screeners**, or **World**.

2. The Navigation pane will then populate with selections. In our example, we've clicked on **World**, and selected **DJIA** to research the tickers of the Down 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 we can input tickers that we would like to research on an ad hoc basis. We can manage these tickers via the Quotes feature.



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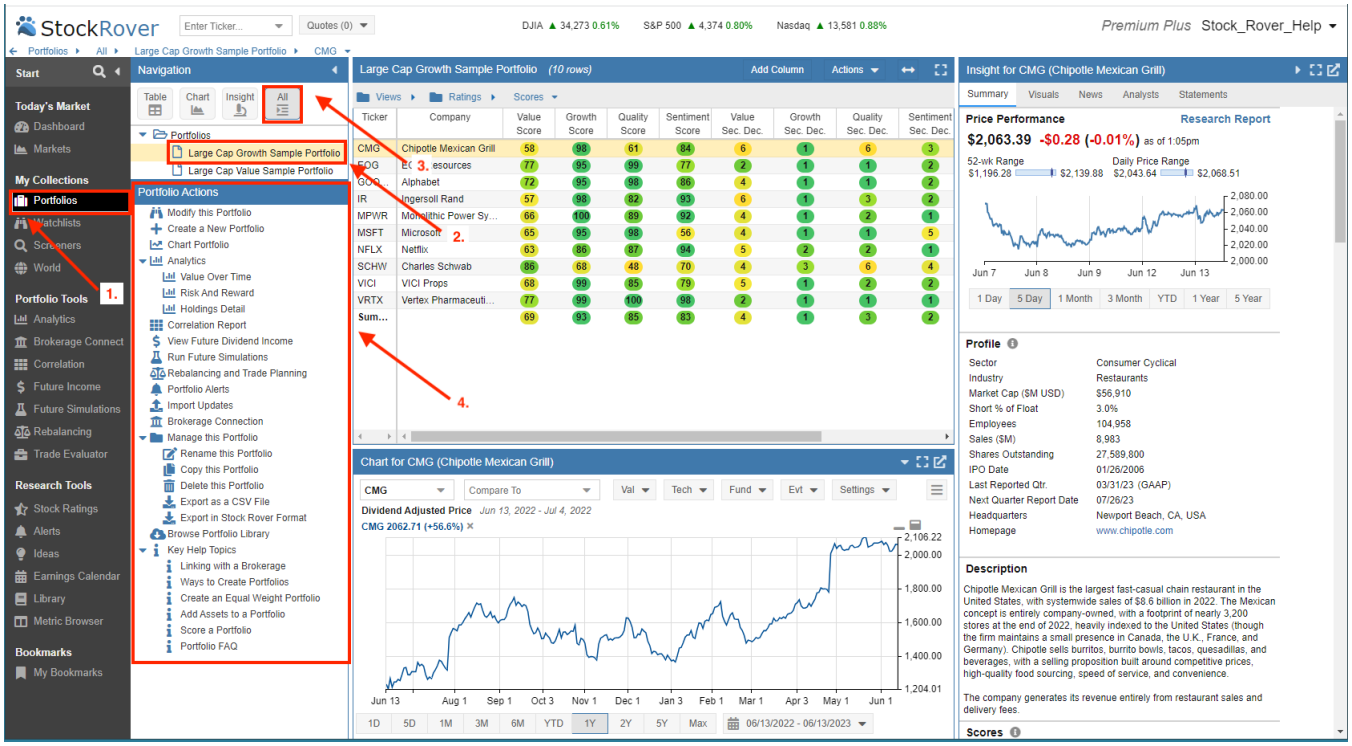
Below is another example, where we are researching the tickers that comprise a Portfolio.

1. We select **Portfolios** under My Collections.

2. **Navigation –** is populated with our portfolios, we then select a portfolio called **Large Cap Growth Sample**.

3. We'll display the research results using **All** layouts.

4. **Actions** – this pane is unique to Portfolios, Watchlists, and Screeners and contains shortcuts to common Portfolio, Watchlist, and Screener functions as well help topics.



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Layouts

Layouts determine how our 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 we 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 Navigation pane.

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. We can also collapse, expand, or detach a layout.

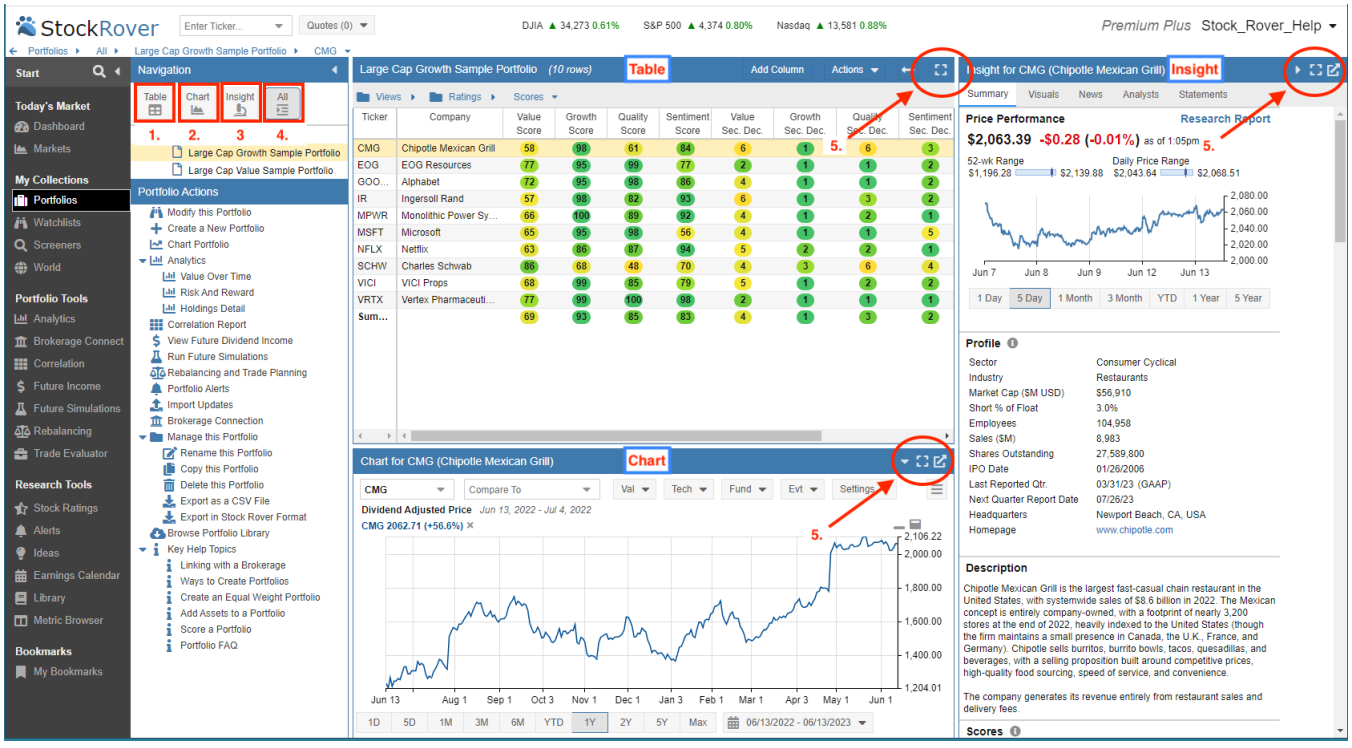

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Table

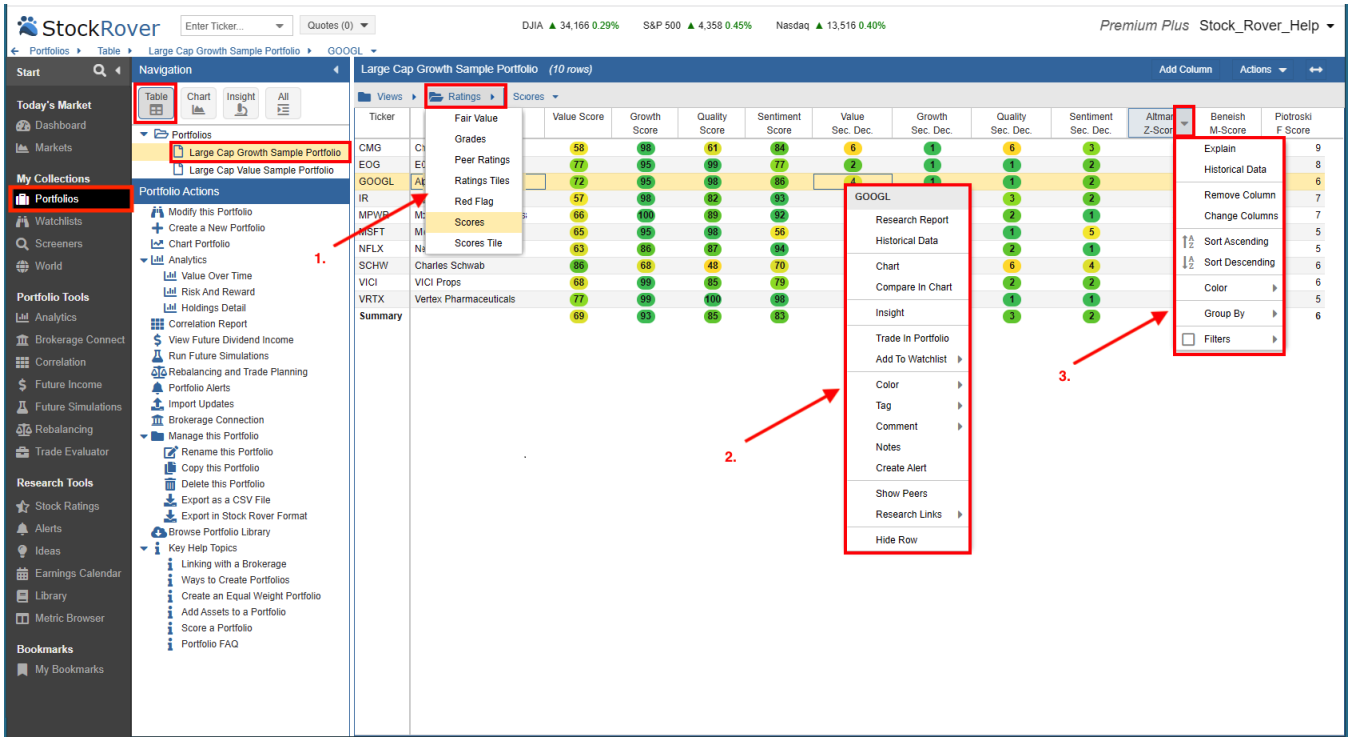
The Table is populated based on what we select in the Navigation pane. In our example, the Table's rows are populated with the 10 tickers that comprise the "Large Cap Growth Sample Portfolio".

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. We can refine the data display by right-clicking on a row for row options.

3. We can also right–click on a column for column options.



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The Table is also configured with Tile Views, which are Views that display tabular and graphical data together. Below we selected the “Scores Tile” 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.

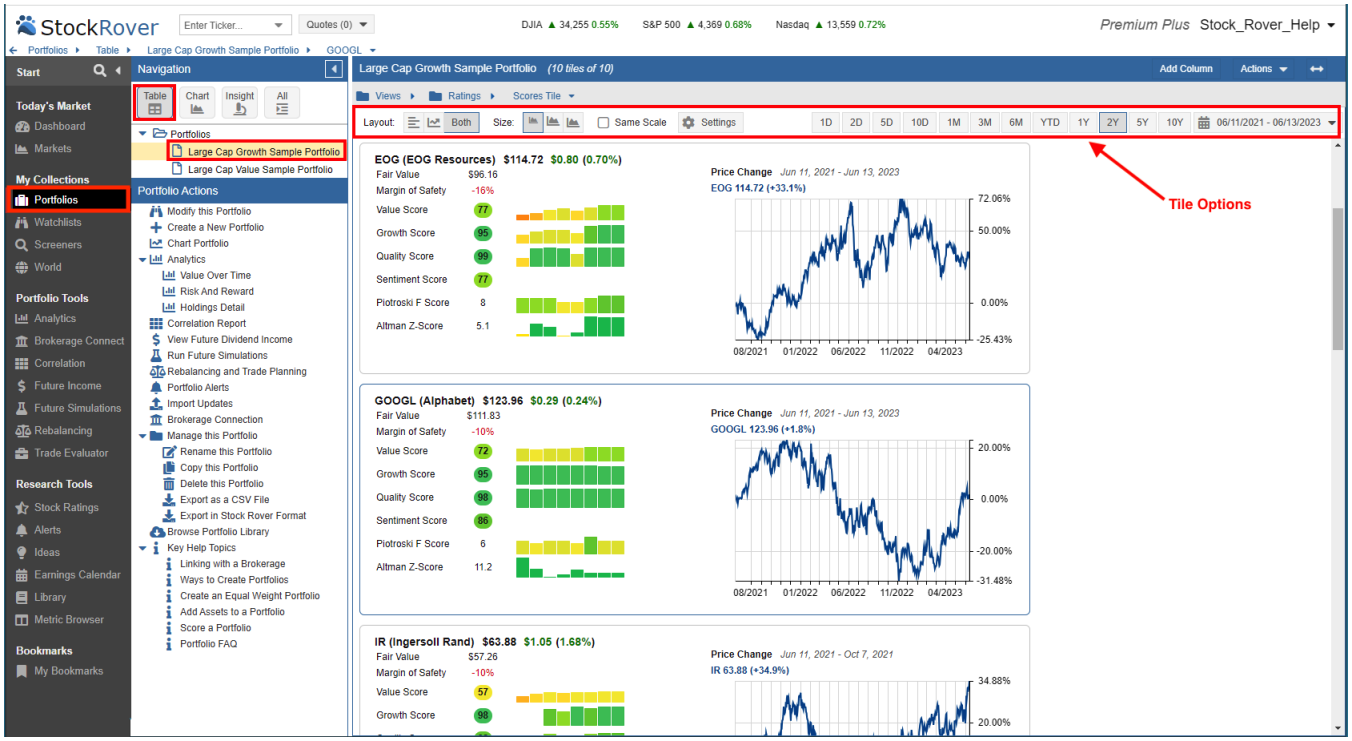

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Chart

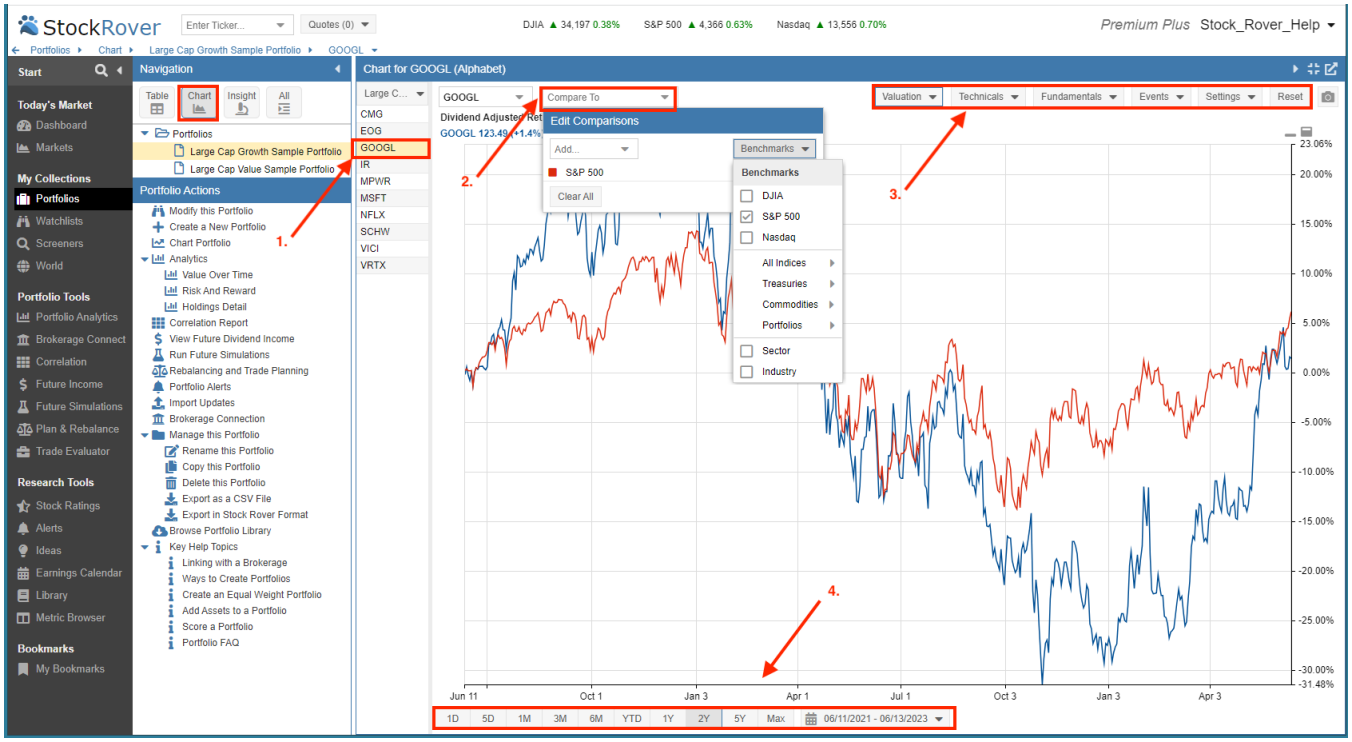
The Chart allows us to chart price, chart over 100 fundamentals, and chart key technical indicators. We can use the chart to baseline stocks for easy relative performance comparison. We can also chart macro entities such as Portfolios, Screeners, and Watchlists.

1. When a row is selected from the Table, the corresponding ticker is charted. We have selected the ticker GOOGL from the Table.

2. We can add more tickers or benchmarks to the current chart.

3. The Chart comes with many configuration options, where can pick from a broad list of technicals, fundamentals, events, and much more.

4. We can chart based on preset date ranges, or we can enter a custom date range.



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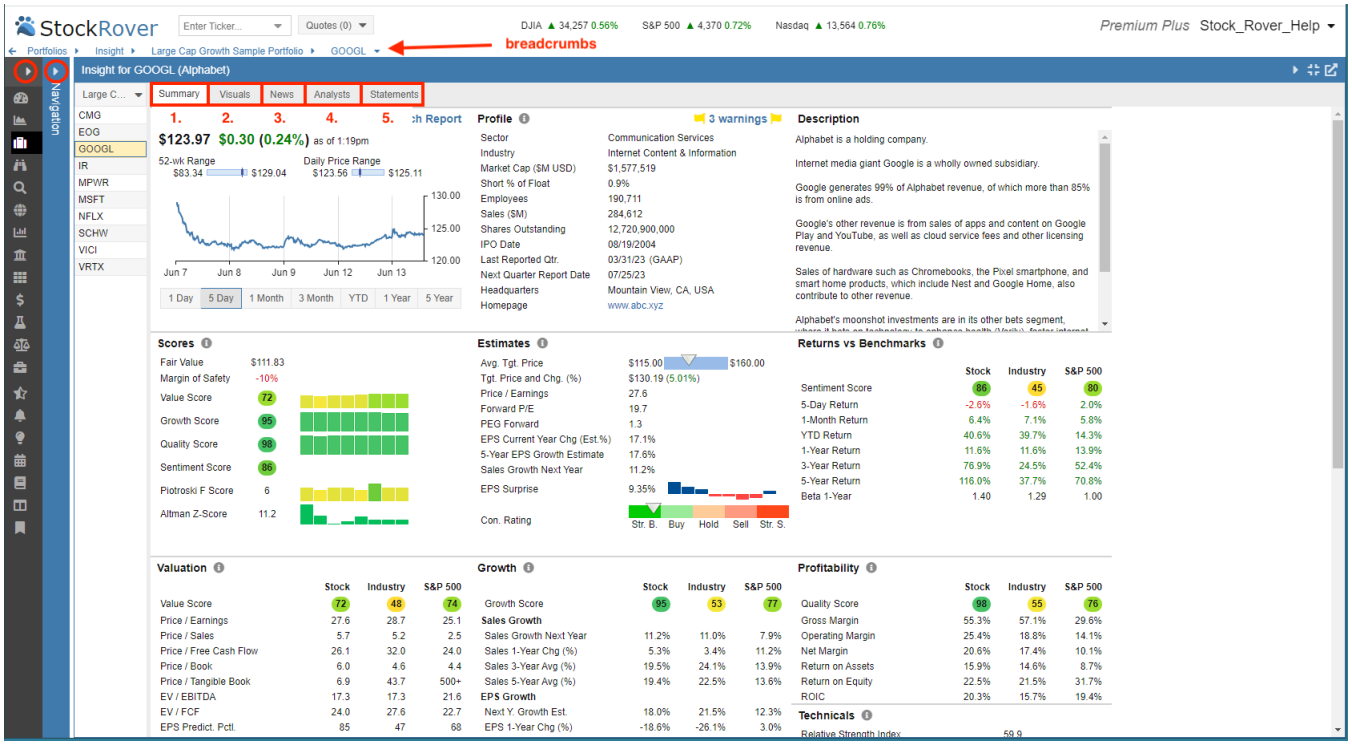
Insight

The Insight panel contains tools for researching a stock in depth. When a row is selected in the Table (in our case GOOGL), data for the corresponding ticker is loaded into the Insight Panel.

Below we collapsed both the Start Menu and the Navigation pane to take better advantage of our screen real estate. Notice the breadcrumbs along the top, clicking on the breadcrumb trial provides for quick navigation in Stock Rover.

The Insight Panel is organized into 5 tabs:

1. **Summary –** includes an array of basic information about the company.
2. **Visuals –** shows EPS, Dividends, Monthly Returns, History, Technicals, vs Peers, and vs Industry.
3. **News –** shows pertinent news.
4. **Analysts** – shows analyst data covering both ratings and estimates.
5. **Statements –** contains income statements, balance sheets, cash flow statements, and more.



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Quotes

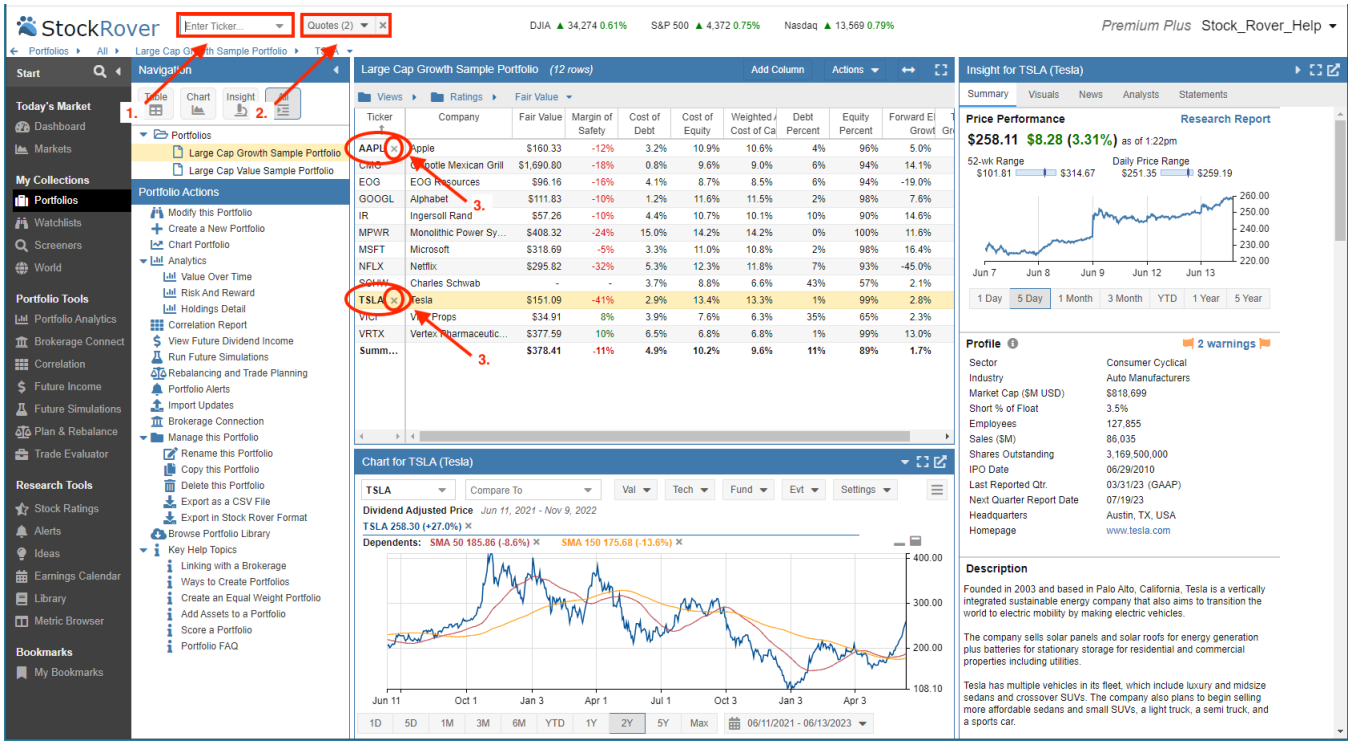
Quotes are situated above the Navigation panel and allow us to quickly add tickers on an ad hoc basis to the Table.

These tickers can then be compared to each other in the Table or viewed alongside any other dataset in the Table.

1. **Enter Ticker –** the tickers we input here will be added to the Quotes list and the Table.

2. **Quotes –** manages the Quotes list. For example, we can recall recently deleted tickers.

3. **Ticker Symbol "x" –** tickers from the Quotes list will show in the Table with an "x" next to them. Clicking the "x" will delete the ticker from the Quotes list.



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Portfolios, Watchlists, and Screeners

We can readily create, modify, or delete our Portfolios, Watchlists, and Screeners.

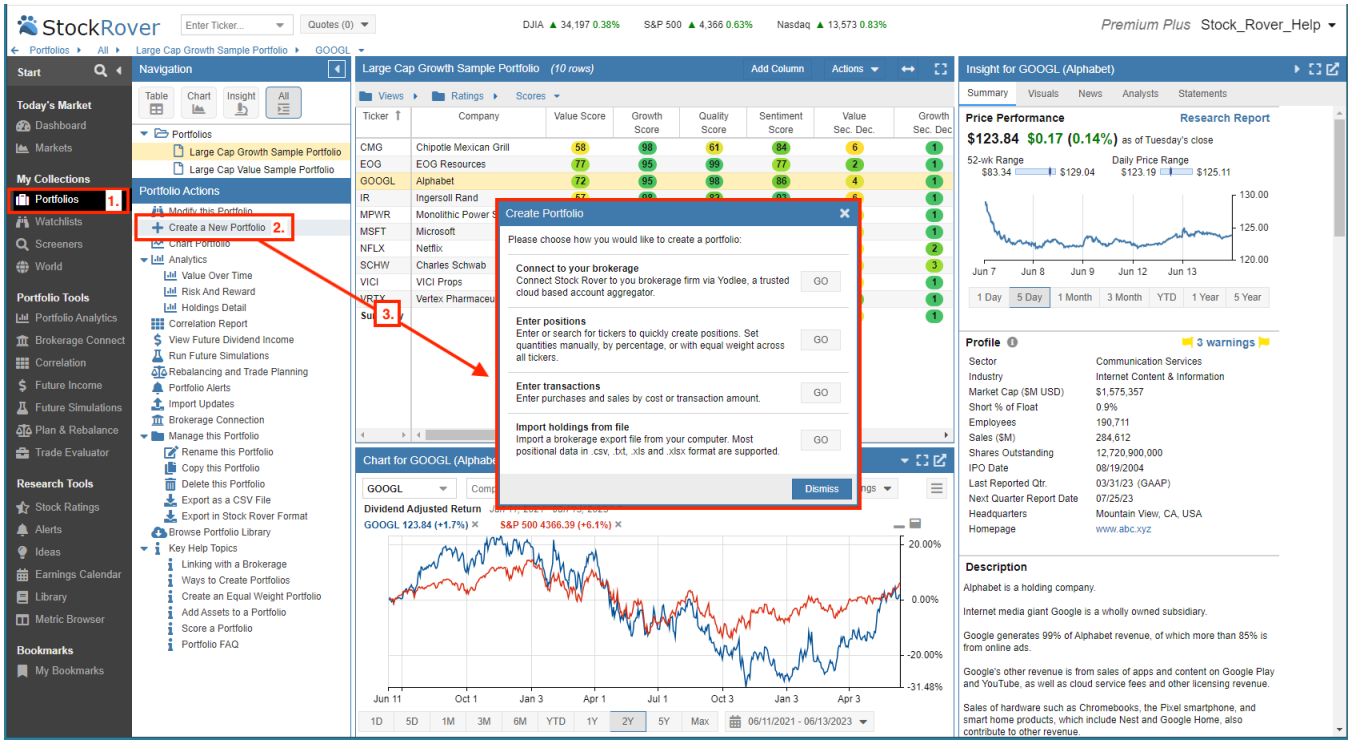
Management functions are accessed via a right–click in the Navigation pane or by selected the appropriate shortcut in the Actions pane.

For example, to create a portfolio:

1. Click on **Portfolios** in the Start Menu.

2. Select **Create a New Portfolio** under Actions.

3. We can now select how we'd like to **Create Portfolio.**



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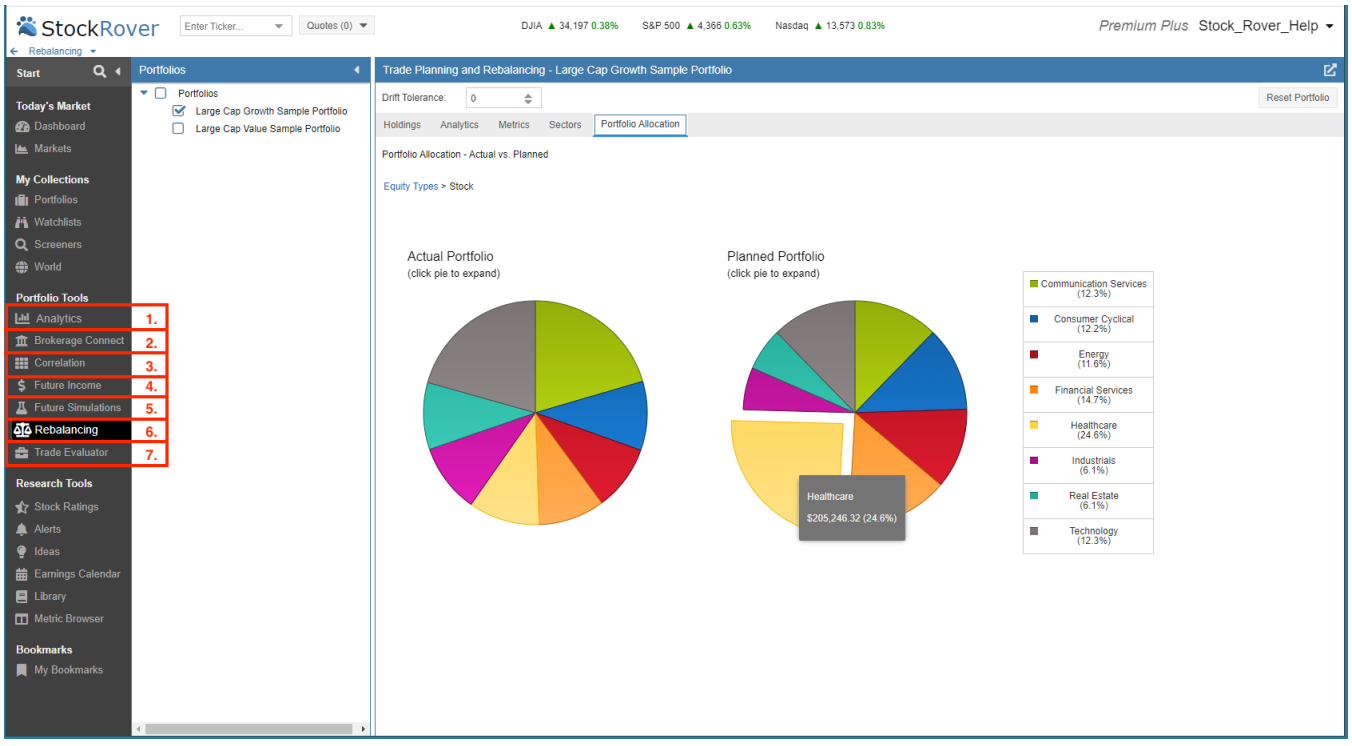
Tracking Portfolio Performance

Portfolio Tools Overview

Stock Rover includes a number of tools that help us manage and monitor our portfolios.

1. **Analytics** – analyze the performance of our portfolios.
2. **Brokerage Connect** – Configure Stock Rover to connect to our brokerage firm(s).
3. **Correlation** – derisk a portfolio.
4. **Future Income** – compute future dividend income.
5. **Future Simulations** – test long-term expected portfolio growth.
6. **Rebalancing** – rebalance as well as perform explicit trade planning.
7. **Trade Evaluator** – evaluate how individual trades have performed.



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Brokerage Connect

In order to analyze portfolio performance, we first have to get our 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.

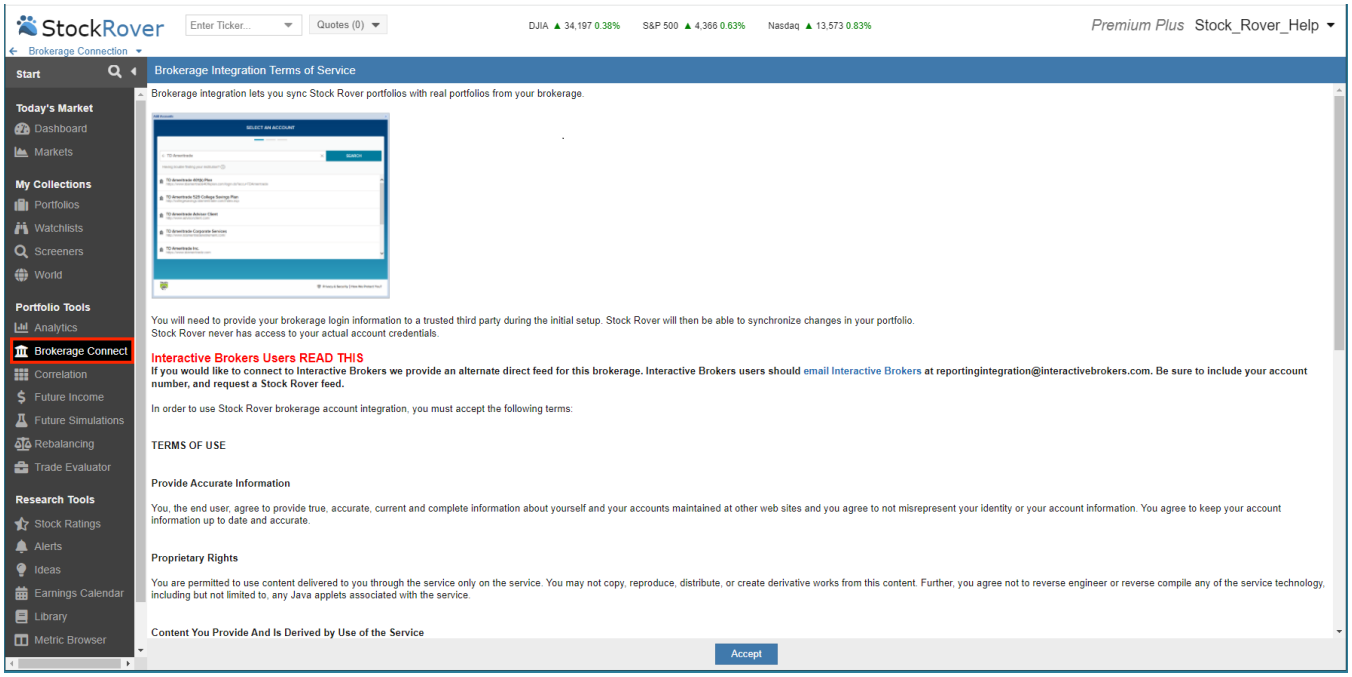
Note: If we don't want to use Brokerage Connect to link Stock Rover to our brokerage, or if the brokerage for some reason is not supported, we can always opt to maintain a manual portfolio.

When we connect via Brokerage Connect, a read–only data feed is established to our 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 we log in.

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



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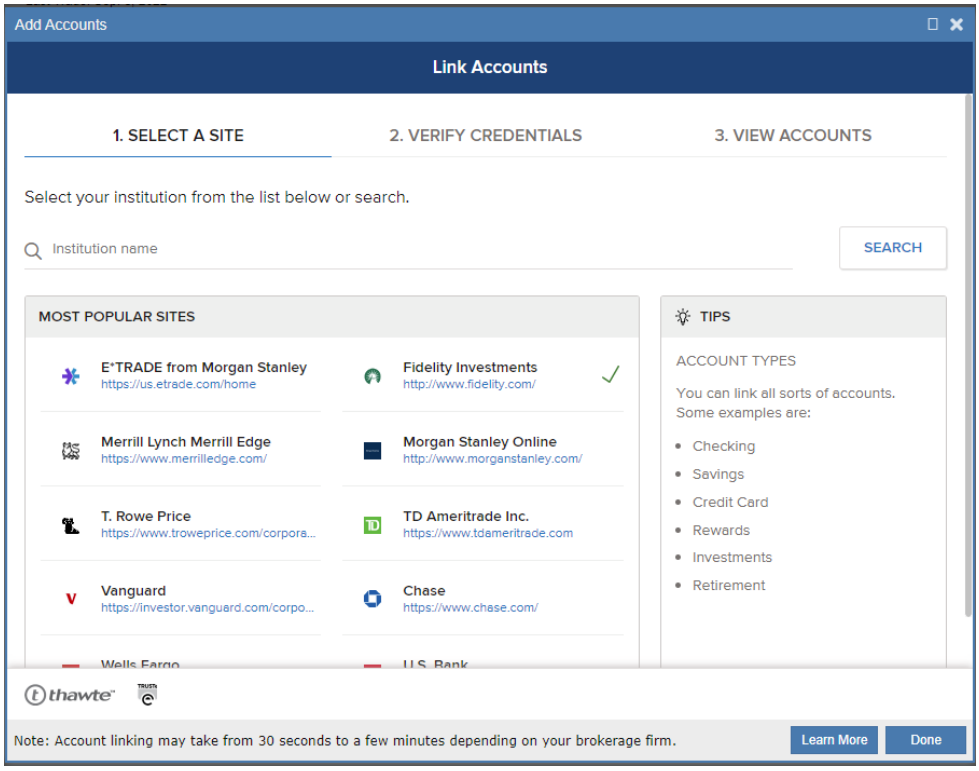
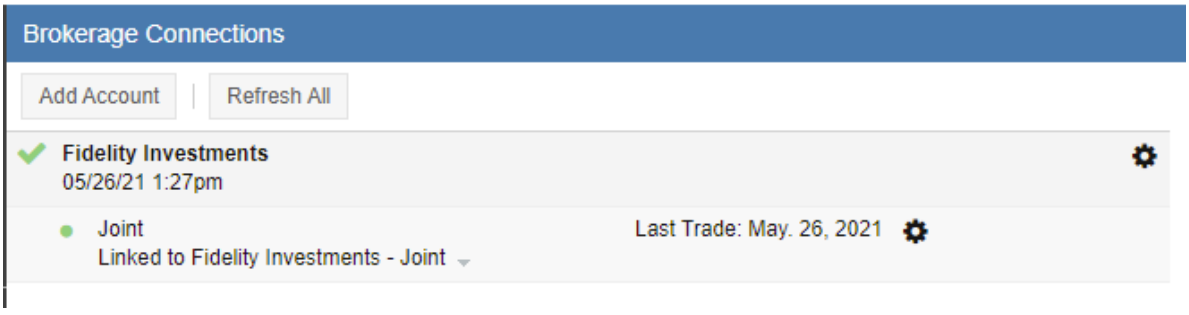
After accepting the Terms of Service, we'll be connected to the Yodlee interface, where we'll be able to search for our brokerage account.



We'll follow the prompts to enter our account login information. Once the connection has been verified, we'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.



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Analytics

The Analytics tool allows us to analyze the overall performance of our portfolio(s) as well as the performance of the individual holdings that constitute our portfolio(s).

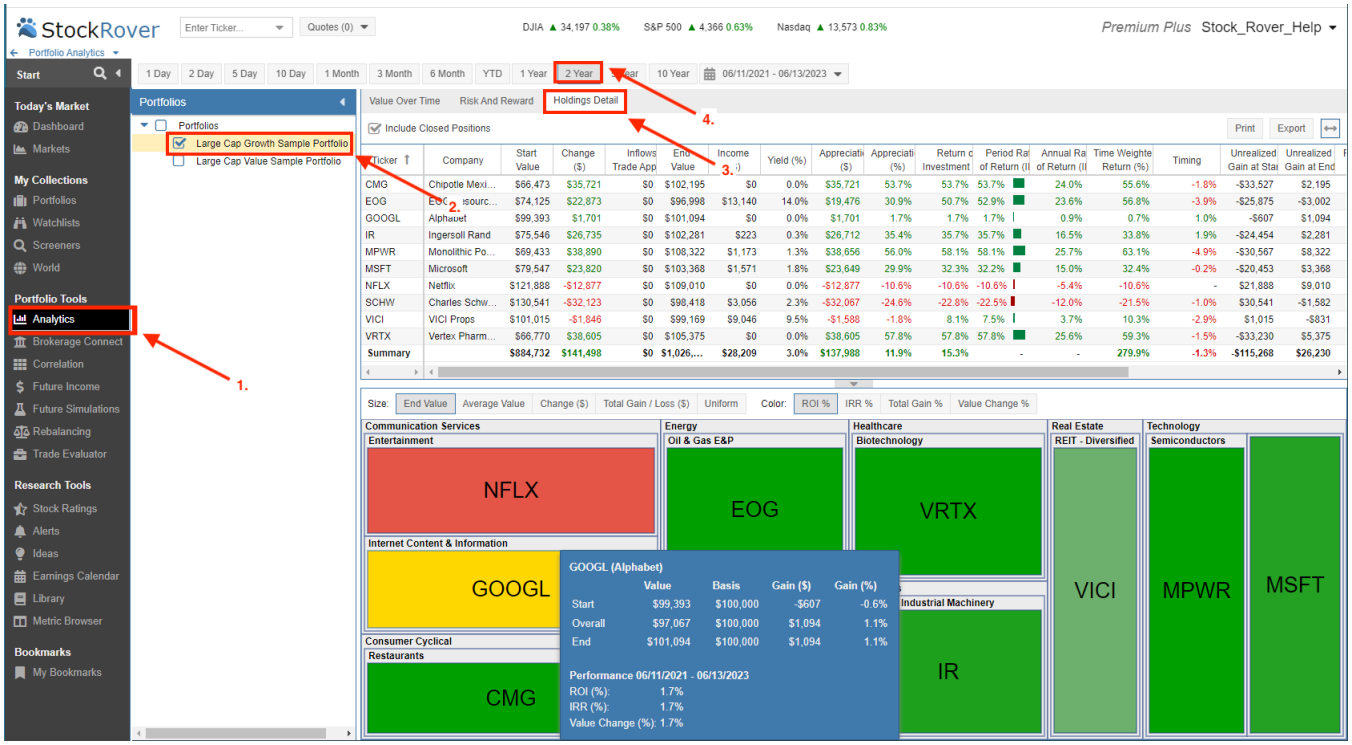
We can analyze portfolio(s) that are linked to brokerage(s) as well as portfolio(s) that are maintained manually in Stock Rover.

1. Select **Analytics** from the Start Menu.

2. Pick the portfolio(s) to analyze.

3. Select the appropriate report.

4. Enter a date range.



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Research Tools

Overview

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

1. **Stock Ratings** – the facility provides investors with a simple overall percentile rank of a company within an industry group.

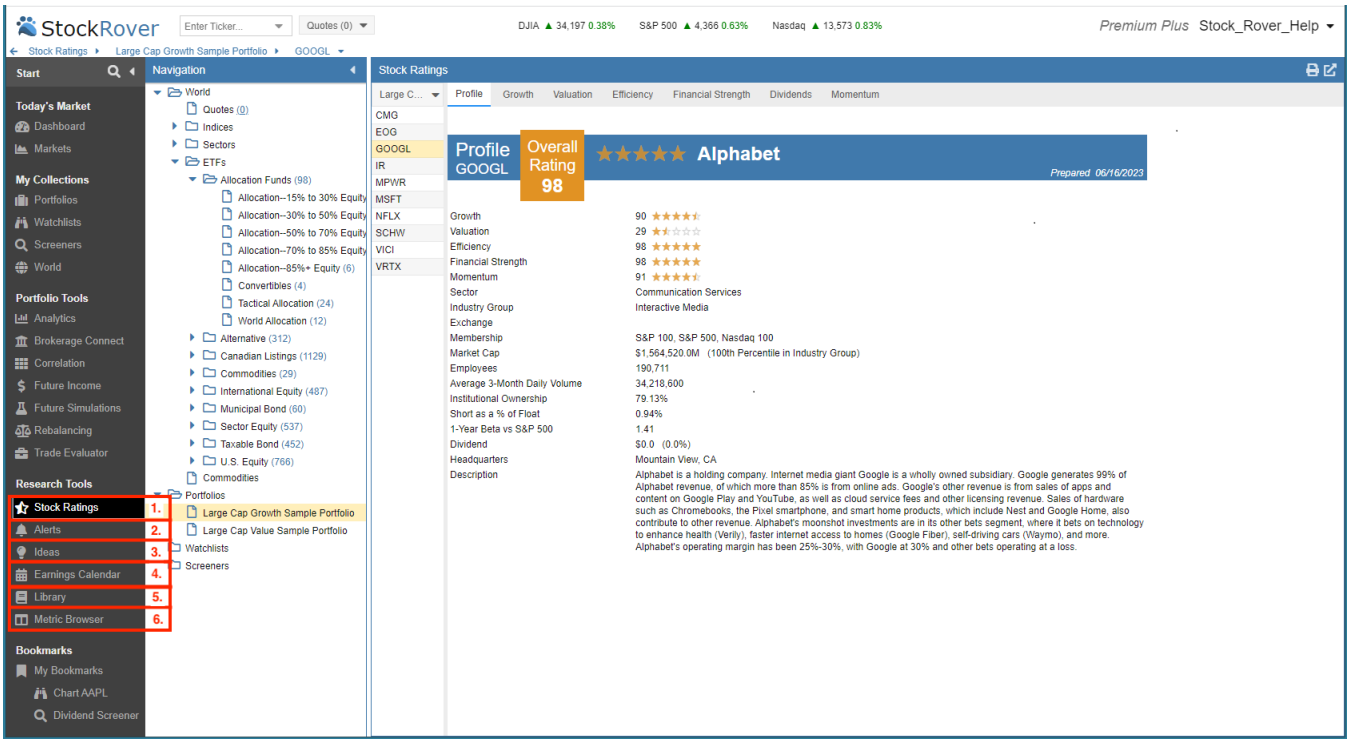
2. **Alerts** – receive a text or email alert when something happens in the market of interest to us.

3. **Ideas** – helpful tips and tools.

4. **Earnings Calendar** – see when companies will report their earnings.

5. **Library** – contains a variety of screeners, model portfolios, watchlists, views, visuals and metric packages that can be imported for use.

6. **Metric Browser** – a fast and easy way to see all the metrics available in Stock Rover.



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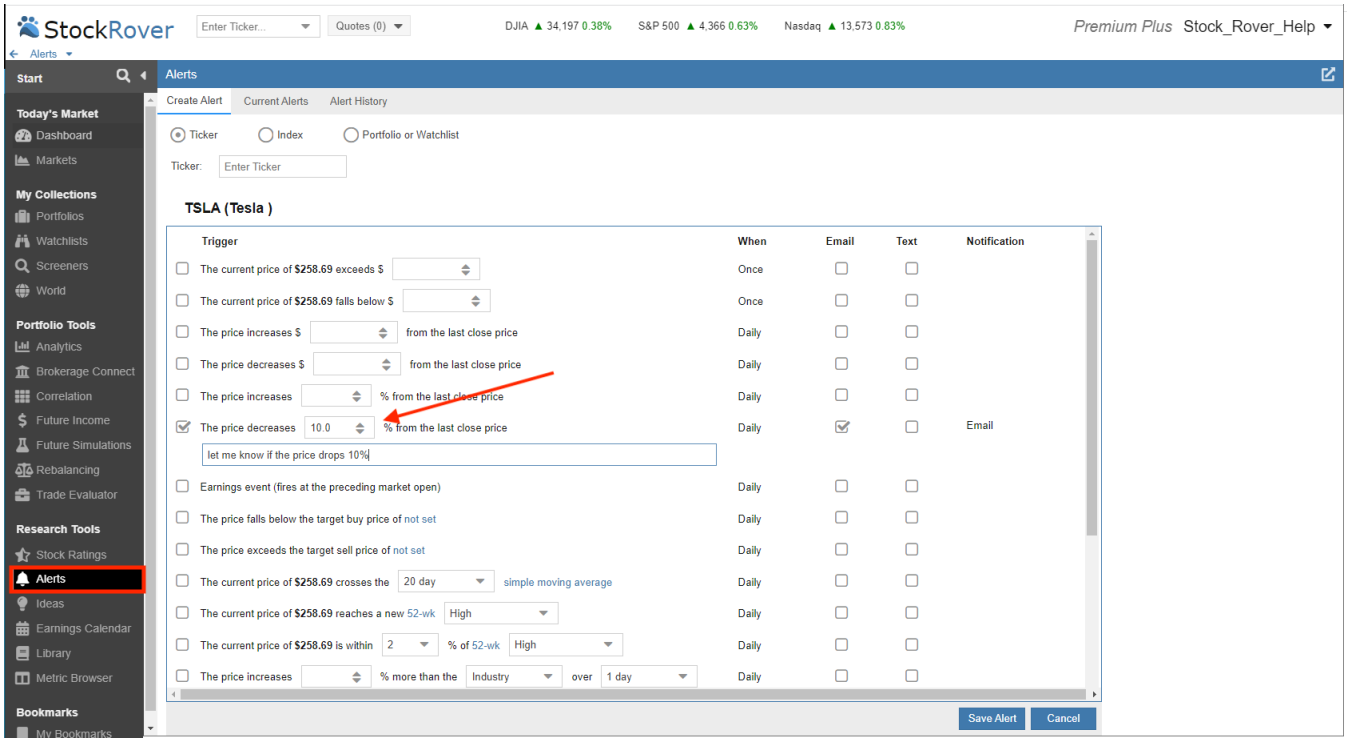
Alerts

Alerts can be set on stocks, ETFs or even indices such as the S&P 500. We can also set alerts on all stocks in a portfolio or watchlist.

The alert below is configured to email us when the price for TSLA (Tesla) decreases 10% from the last close price.



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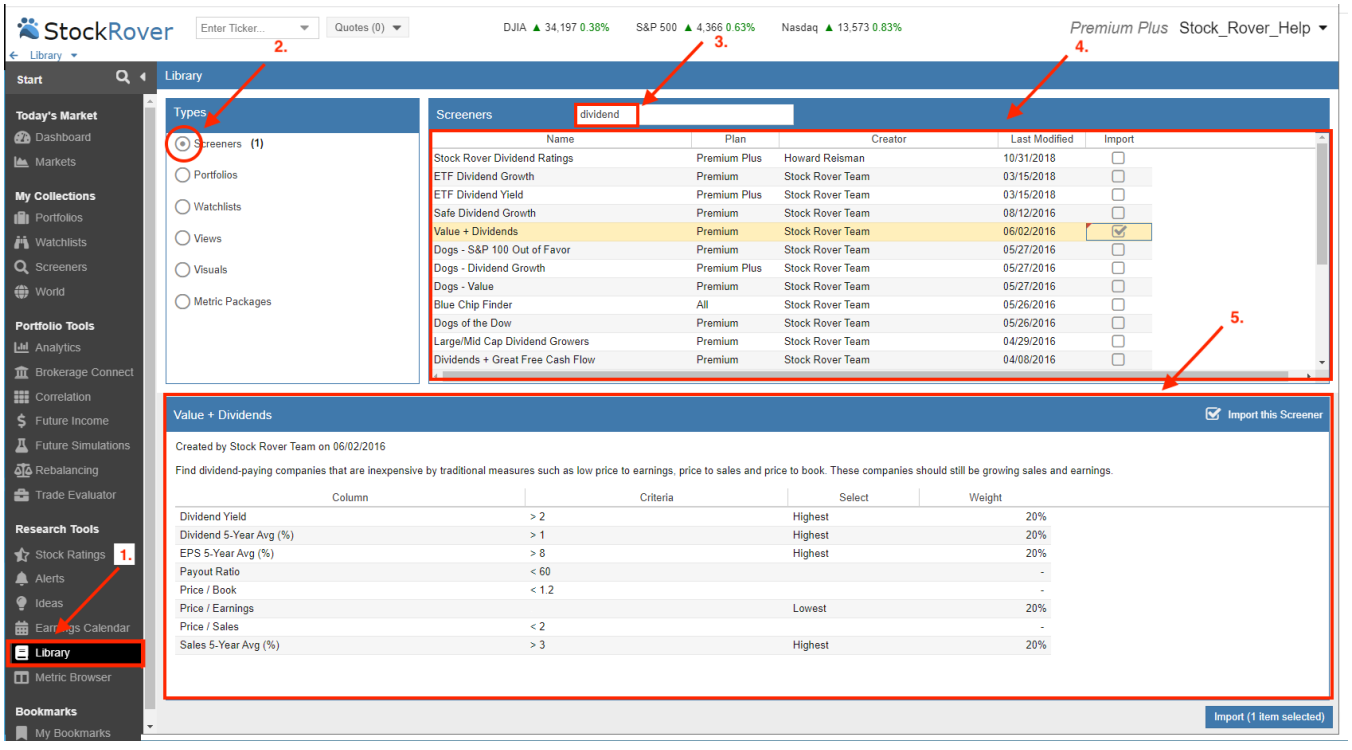
Library

The Library is a repository for a variety of different investment research resources that we can import into our Stock Rover account for our 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.



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Bookmarks

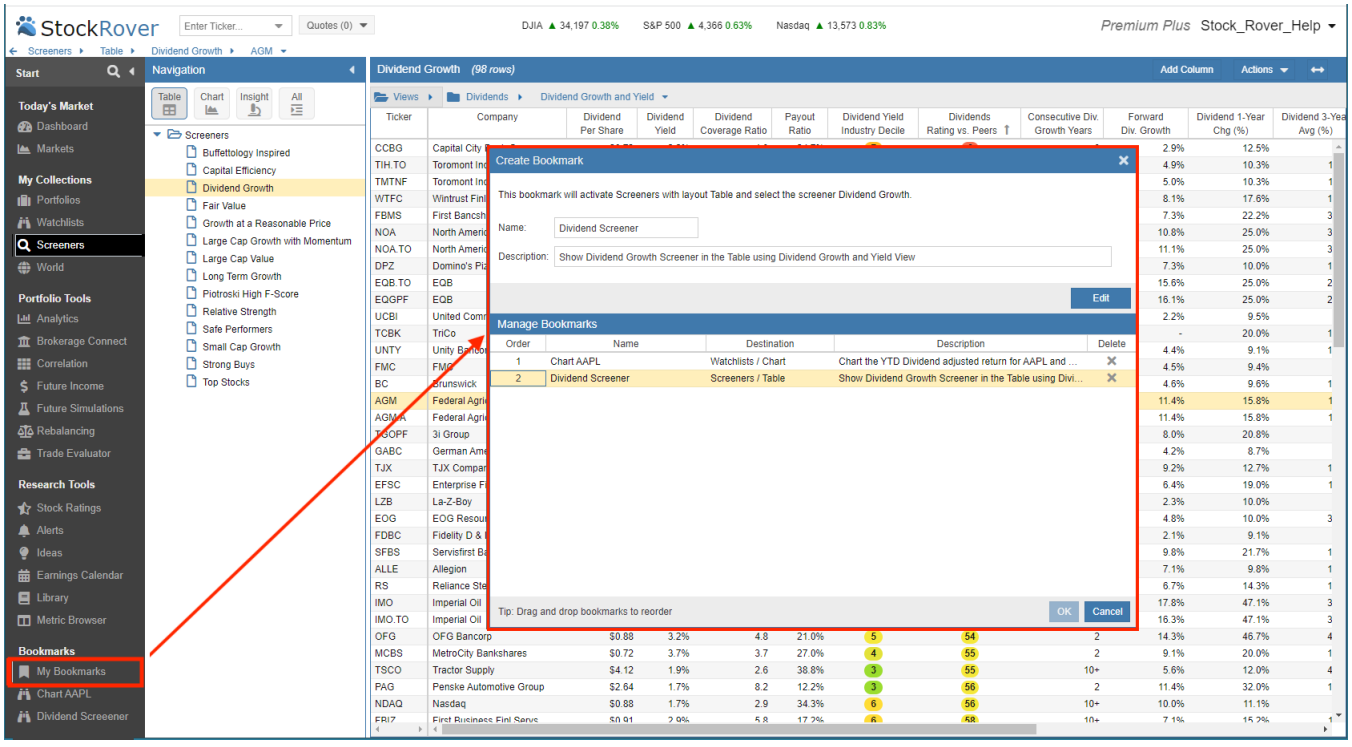
Bookmarks provide us with a quick and easy way for us to customize the Start Menu with the parts of Stock Rover that we use most often and want to quickly access.

Once we've accessed a function we want to bookmark, we'll click on **My Bookmarks** in the Start Menu to launch the Bookmark Manager. Here we can name the bookmark and enter a description.

The bookmark will then show under My Bookmarks in the Start Menu. Our example below is showing 2 bookmarks.

1. Chart AAPL – Charts the YTD dividend-adjusted return for AAPL (Apple)

2. Dividend Screener – Uses the results of the Dividend Growth Screener to load the Table with the Dividend Growth and Yield view.



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