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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 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.

StockRover Quotes DJIA ▲ 34,066 0.56% S&P 500 ▲ 4,339 0.93% Nasdaq ▲ 13,462 1.53 Premium Plus Stock_Rover_Help

Markets

Start

Today's Market

- Dashboard
- Markets

My Collections

- Portfolios
- Watchlists
- Screeners
- World

Portfolio Tools

- Analytics
- Brokerage Connect
- Correlation
- Future Income
- Future Simulations
- Rebalancing
- Trade Evaluator

Research Tools

- Stock Ratings
- Alerts
- Ideas
- Earnings Calendar
- Library
- Metric Browser

Bookmarks

- My Bookmarks

Market Summary News Stocks ETFs Bonds Commodities

Index	Value	Gain	% Change
DJIA	34,066.33	189.55	0.56%
Nasdaq	13,461.92	202.82	1.53%
S&P 500	4,338.93	40.07	0.93%

VIX 21.14 0.00% US 2 1.05% Volatility S&P 500 70.35 0.00%
Daily Treasury Yield Cur 10 Year 1.975.70 0.00%

DJIA 1D 5D 1M 6M 1Y 2Y 5Y

9:30 11:00 12:00 1:00 2:00 3:00 4:00

33,800 33,900 34,000 34,100

Indices 1 Day 5 Day 1 Month 3 Month YTD 1 Year

Index	Price	1D Return	52-wk Range
Nasdaq 100	13,461.92	1.5%	10,088.80 - 13,361.90
Nasdaq	13,461.92	1.5%	10,088.80 - 13,361.90
S&P 100	1,756.43	1.1%	1,615.09 - 1,966.75
S&P 500	4,338.93	0.9%	3,491.58 - 4,325.28
DJIA	34,066.33	0.6%	28,660.90 - 34,712.30
Russell 2000	1,828.33	0.4%	1,649.84 - 2,021.35
FTSE 100	7,502.89		6,826.15 - 7,573.05
S&P/TSX	19,942.70		17,873.20 - 20,843.20
VIX	21.14		19.06 - 33.63
Crude Oil	\$70.35		63.64 - 123.68
Gold	\$1,975.70		1,615.10 - 2,072.00

Sectors 1 Day 5 Day 1 Month 3 Month YTD 1 Year

Sector	1D Return	52-wk Range
Technology	2.1%	\$291.62 - \$426.52
Consumer Cyclical	1.7%	\$213.73 - \$290.54
Communication Services	1.1%	\$78.25 - \$105.31
Industrials	0.9%	\$156.85 - \$197.88
Healthcare	0.5%	\$217.12 - \$259.04
Basic Materials	0.5%	\$146.72 - \$189.76
Real Estate	0.0%	\$74.66 - \$102.37
Consumer Defensive	-0.1%	\$170.83 - \$201.65
Financial Services	-0.1%	\$72.96 - \$90.87
Utilities	-0.2%	\$131.72 - \$169.55
Energy	-1.1%	\$90.87 - \$132.63

Market News

More Feeds

C3 ai, Palantir, AMD, Nvidia Rise After Oracle Earnings Bring More AI Optimism - Barron's
Google News - Today 7:46 am
C3 ai, Palantir, AMD, Nvidia Rise After Oracle Earnings Bring More AI Optimism Barron's Oracle beats on top and bottom lines as cloud revenue jumps CNBC Oracle Analyst Sees More Stock After Monday's 6% Surge - Oracle (NYSE:ORCL) Benzinga Oracle Stock Spikes as Analyst Turns Bullish, Cites Market- Share Gains in Cloud Barron's Oracle Crushes Q4: Larry Revengal! Acceleration Economy View Full Coverage on Google News

Stock futures tick higher ahead of key May inflation report: Live updates - CNBC

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.

Start
Dashboard

Today's Market

Dashboard

Markets

My Collections

Portfolios

Watchlists

Screeners

World

Portfolio Tools

Analytics

Brokerage Connect

Correlation

Future Income

Future Simulations

Rebalancing

Trade Evaluator

Research Tools

Stock Ratings

Alerts

Ideas

Earnings Calendar

Library

Metric Browser

Bookmarks

My Bookmarks

Portfolios
Return: 1 Day 5 Day 10 Day 1 Month 3 Month YTD 1 Year 2 Year 5 Year

Portfolios (1 of 5)

\$1,008,944

▲ \$10,528 1.05%

Crude Oil 70.94 0.00% Gold 1,935.50 0.00%

DJIA

33,927

▼ -24.78 -0.07%

Volatility S&P 500 13.88 0.00%

S&P 500

4,378

▲ 12.72 0.29%

10-Year Treasury 3.77 0.80%

Nasdaq

13,556

▲ 53.47 0.40%

Portfolio Change in Value 1 Day (1 of 5)

Folder ↑	Name	1D Chg. (%)	1D Chg. (\$)	Value (%)	Value	Total Gain (\$)
Default	Large Cap Value Sample Portfolio	1.05%	\$10,528	100.0%	\$1,008,944	\$8,944

Market Movers

S&P 500

Ticker	Company	Price	1D Chg. (\$)	1D Return
TSLA	Tesla	\$250.14	-\$6.40	-2.5%
CCL	Carnival	\$15.88	\$1.32	9.0%
AMD	Advanced Micro Devices	\$110.37	-\$1.60	-1.4%
F	Ford Motor	\$14.41	\$0.34	2.4%
AAPL	Apple	\$188.05	\$0.09	0.0%
WBA	Walgreens Boots Alliance	\$28.64	-\$2.78	-8.0%
AMZN	Amazon.com	\$129.14	-\$1.83	-1.4%
NVDA	NVIDIA	\$418.70	-\$7.54	-1.8%
AAL	American Airlines Group	\$17.35	\$1.05	6.4%
GOOGL	Alphabet	\$118.30	-\$3.21	-2.6%
BAC	Bank of America	\$28.24	\$0.25	0.9%

Sector Performance

Sector ↑	1D Return	52-wk Range
Basic Materials	1.5%	\$146.72 - \$189.76
Communication Services	0.4%	\$78.25 - \$107.33
Consumer Cyclical	0.2%	\$213.73 - \$290.54
Consumer Defensive	1.0%	\$170.83 - \$201.65
Energy	0.4%	\$90.87 - \$132.63
Financial Services	0.4%	\$72.96 - \$90.87
Healthcare	0.2%	\$220.50 - \$259.04
Industrials	1.4%	\$156.85 - \$202.82
Real Estate	2.5%	\$74.66 - \$102.37
Technology	0.3%	\$291.62 - \$447.92
Utilities	1.1%	\$131.72 - \$169.55

Market News

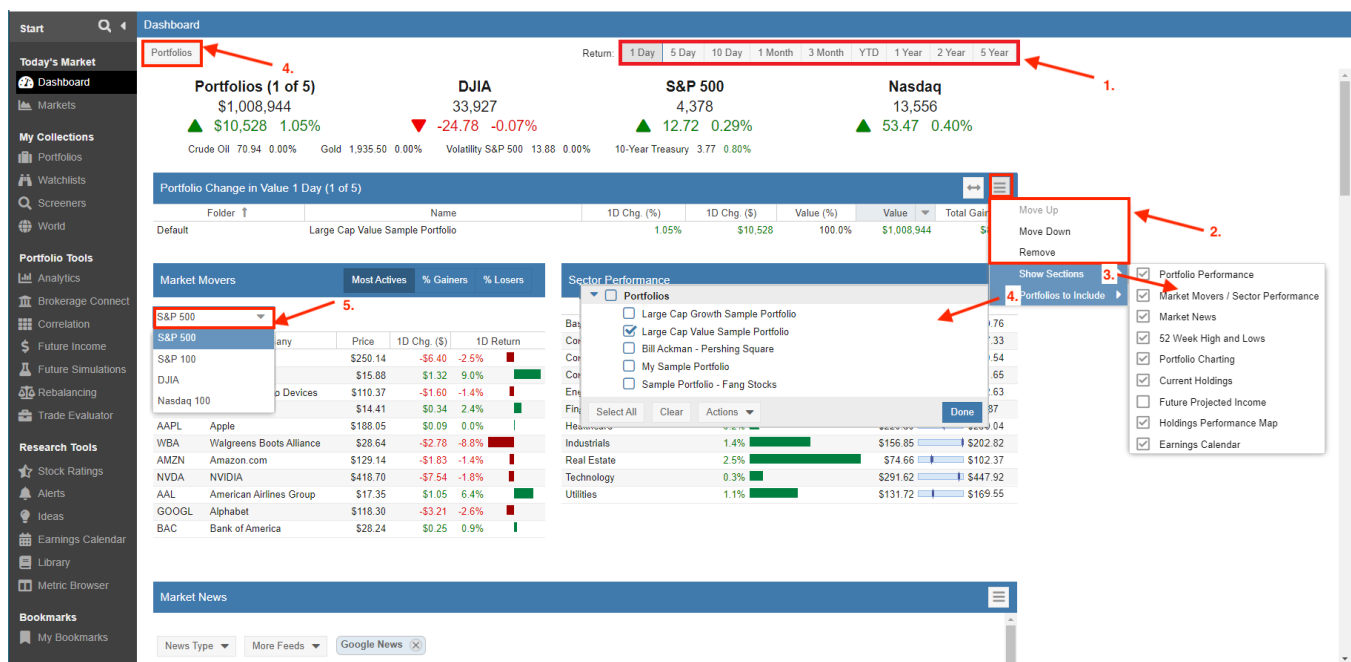
News Type More Feeds Google News

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



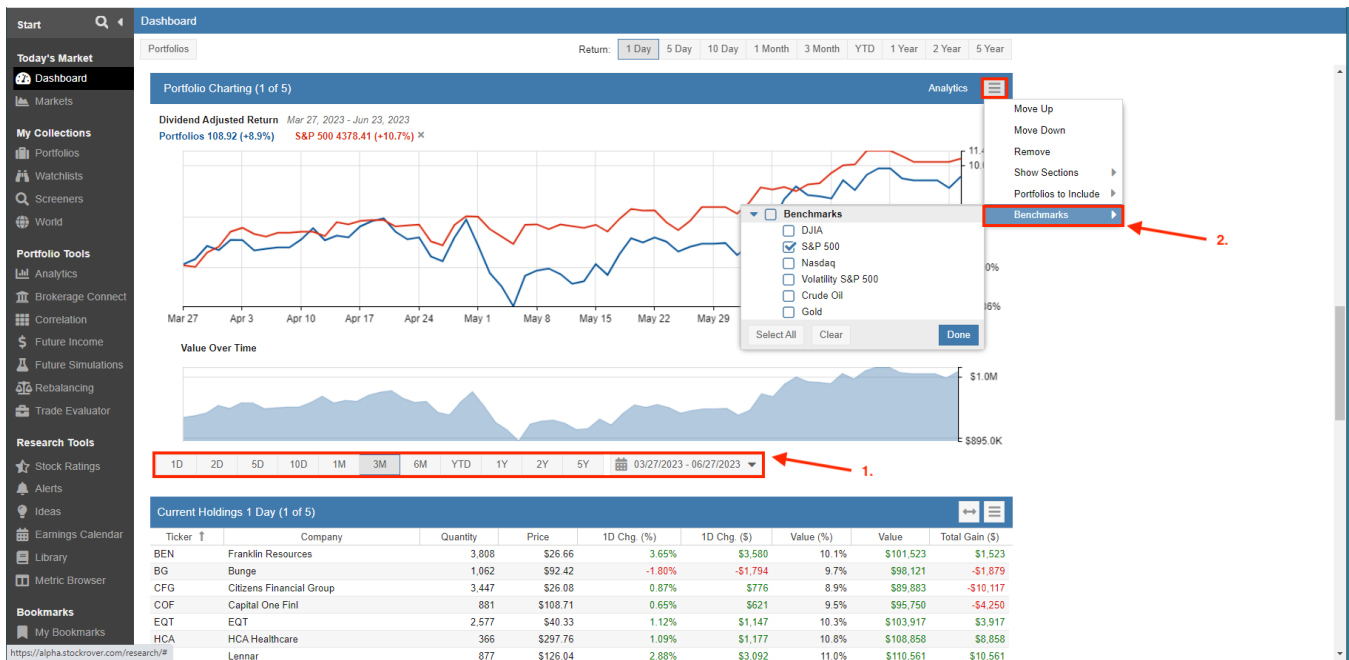
The screenshot shows the Stock Rover dashboard with several sections and configuration options. Red arrows and numbers 1 through 5 highlight specific configuration points:

- 1.** Points to the date selection menu at the top right, which includes options like 1 Day, 5 Day, 10 Day, 1 Month, 3 Month, YTD, 1 Year, 2 Year, and 5 Year.
- 2.** Points to a context menu with options: Move Up, Move Down, and Remove.
- 3.** Points to the 'Show Sections' button in the context menu.
- 4.** Points to the 'Portfolios to Include' dropdown menu in the context menu.
- 5.** Points to the 'S&P 500' dropdown menu in the 'Market Movers' section.

The dashboard displays various market data, including 'Portfolios (1 of 5)' with a total value of \$1,008,944 and a 1.05% change, and 'Market Movers' showing the S&P 500 index. The 'Sector Performance' section shows performance for various sectors like Industrials, Real Estate, Technology, and Utilities.

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.



Current Holdings 1 Day (1 of 5)

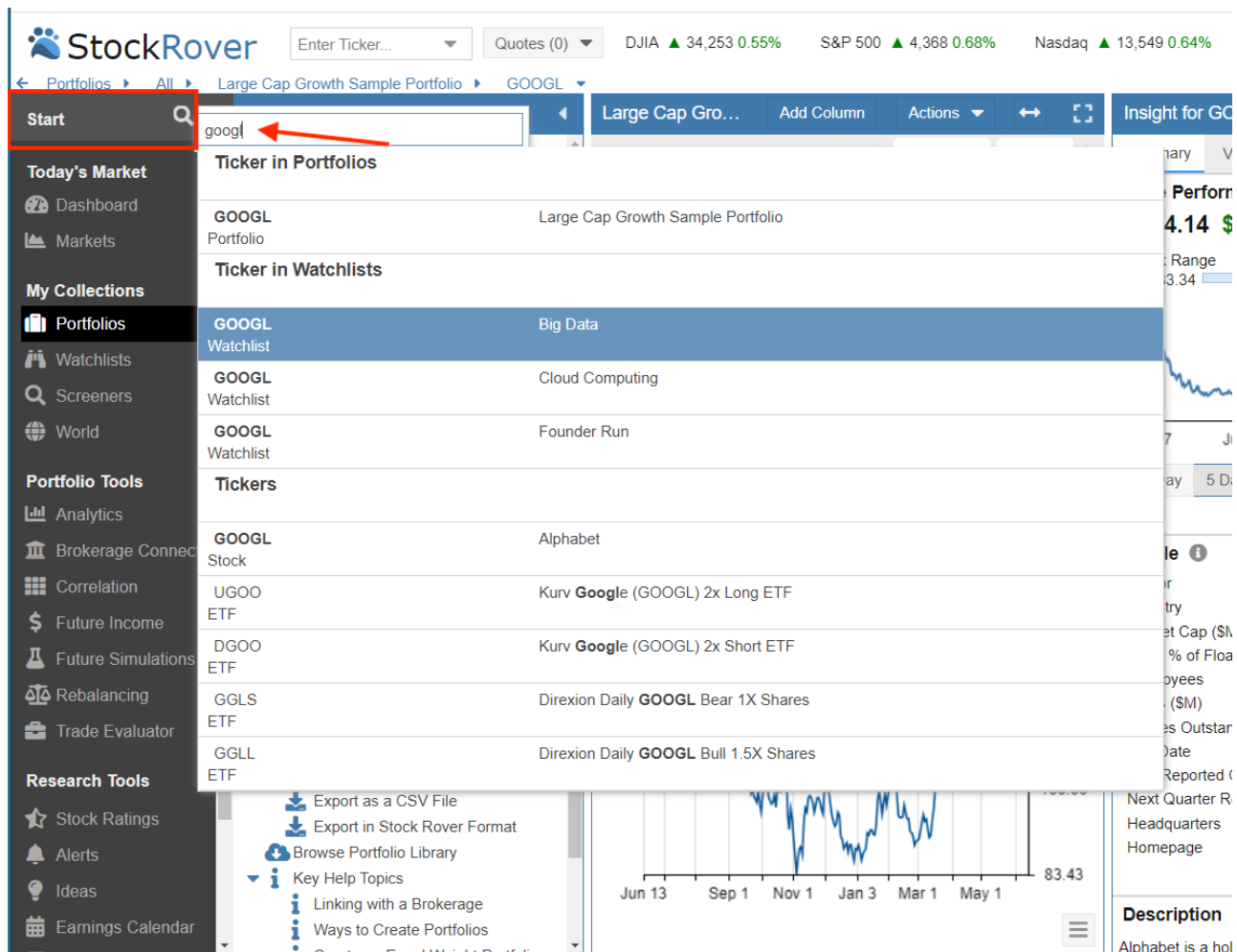
Ticker	Company	Quantity	Price	1D Chg. (%)	1D Chg. (\$)	Value (%)	Value	Total Gain (\$)
BEN	Franklin Resources	3,808	\$26.66	3.65%	\$3,580	10.1%	\$101,523	\$1,523
BG	Bunge	1,062	\$92.42	-1.80%	-\$1,794	9.7%	\$98,121	-\$1,879
CFG	Citizens Financial Group	3,447	\$26.08	0.87%	\$776	8.9%	\$89,883	-\$10,117
COF	Capital One Finl	881	\$108.71	0.65%	\$621	9.5%	\$95,750	-\$4,250
EQT	EQT	2,577	\$40.33	1.12%	\$1,147	10.3%	\$103,917	\$3,917
HCA	HCA Healthcare	366	\$297.76	1.09%	\$1,177	10.8%	\$108,858	\$8,858
	Lennar	877	\$126.04	2.88%	\$3,092	11.0%	\$110,561	\$10,561

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.



The screenshot shows the Stock Rover interface with a search for 'googl' in the 'Start' menu. The search results are displayed in a dropdown menu, listing various portfolios, watchlists, and tickers related to Google (GOOGL). A red arrow points to the search input field.

Category	Item	Description
Ticker in Portfolios	GOOGL Portfolio	Large Cap Growth Sample Portfolio
Ticker in Watchlists	GOOGL Watchlist	Big Data
	GOOGL Watchlist	Cloud Computing
	GOOGL Watchlist	Founder Run
Tickers	GOOGL Stock	Alphabet
	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 ETF	Direxion Daily GOOGL Bull 1.5X Shares

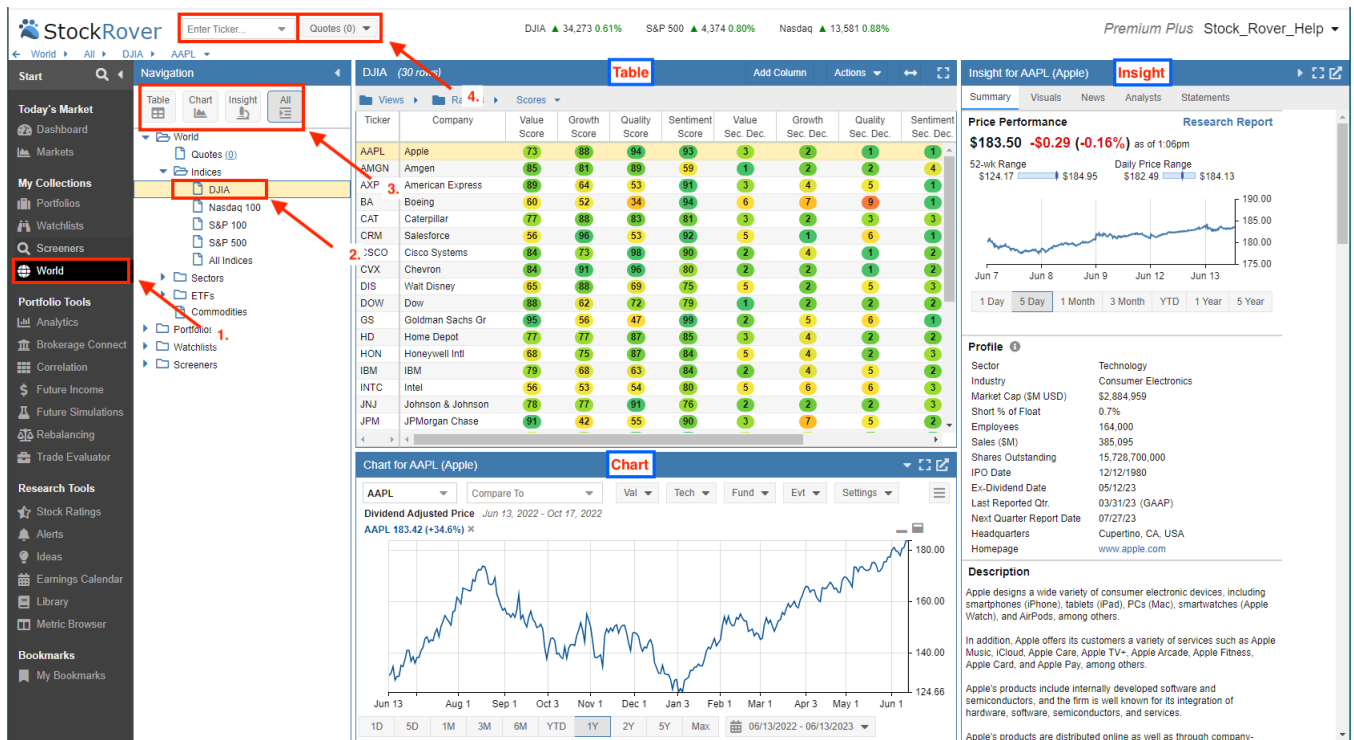
Additional visible elements include a navigation sidebar on the left with categories like 'Today's Market', 'My Collections', 'Portfolio Tools', and 'Research Tools'. The top of the interface shows market indices (DJA, S&P 500, Nasdaq) and a search bar with 'googl' entered. A line chart for GOOGL is visible on the right side of the interface.

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.

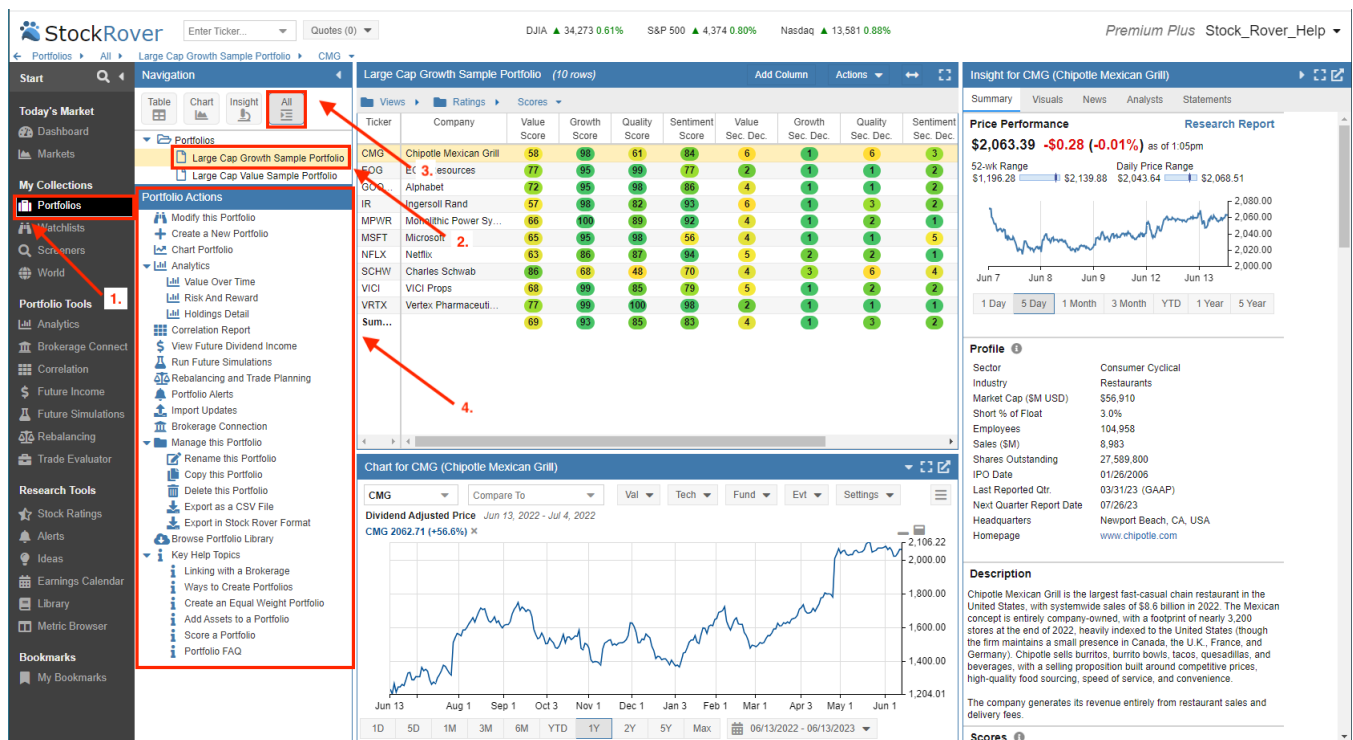


The screenshot displays the Stock Rover interface with several key components highlighted by red boxes and arrows:

- Navigation Pane (Left):** The 'World' category is selected, and 'DJIA' is chosen under the 'Indices' sub-category.
- Table View (Center):** A table of DJIA tickers is shown with columns for Ticker, Company, Value Score, Growth Score, Quality Score, Sentiment Score, and various Dec. metrics. The table is currently set to 'Table' layout.
- Chart View (Bottom):** A line chart for AAPL (Apple) is displayed, showing the Dividend Adjusted Price from Jun 13 to Jun 1. The price is currently at 183.42 (+34.6%).
- Insight Panel (Right):** A detailed view for AAPL is shown, including a Price Performance chart (183.50, -0.29, -0.16%), a Research Report, and a Profile section with company details like Sector (Technology), Industry (Consumer Electronics), and Market Cap (\$2,884,959).

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.



The screenshot displays the Stock Rover interface. On the left, the 'My Collections' sidebar shows 'Portfolios' selected. The 'Navigation' pane lists 'Large Cap Growth Sample Portfolio' and 'Large Cap Value Sample Portfolio'. The 'All' layout is selected in the top navigation bar. The main area shows a table of tickers in the 'Large Cap Growth Sample Portfolio' with columns for Ticker, Company, Value Score, Growth Score, Quality Score, and Sentiment Score. A detailed view for CMG (Chipotle Mexican Grill) is shown on the right, including a price performance chart, a profile section with key statistics, and a description of the company.

Ticker	Company	Value Score	Growth Score	Quality Score	Sentiment Score	Value Sec. Dec.	Growth Sec. Dec.	Quality Sec. Dec.	Sentiment Sec. Dec.
CMG	Chipotle Mexican Grill	58	68	61	84	6	1	6	3
GOOGL	Alphabet	77	85	89	77	2	1	1	2
GOOG	Alphabet	72	85	88	88	4	1	1	2
IR	Ingersoll Rand	57	88	82	83	6	1	3	2
MPWR	Monolithic Power Sys...	68	89	89	82	4	1	2	1
MSFT	Microsoft	85	85	89	56	4	1	1	5
NFLX	Netflix	63	89	87	84	5	2	2	1
SCHW	Charles Schwab	69	68	48	70	4	3	6	4
VICI	VICI Props	68	89	85	79	5	1	2	2
VRTX	Vertex Pharmaceuti...	77	89	100	88	2	1	1	1
Sum...		69	83	85	83	4	1	3	2

Layouts

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

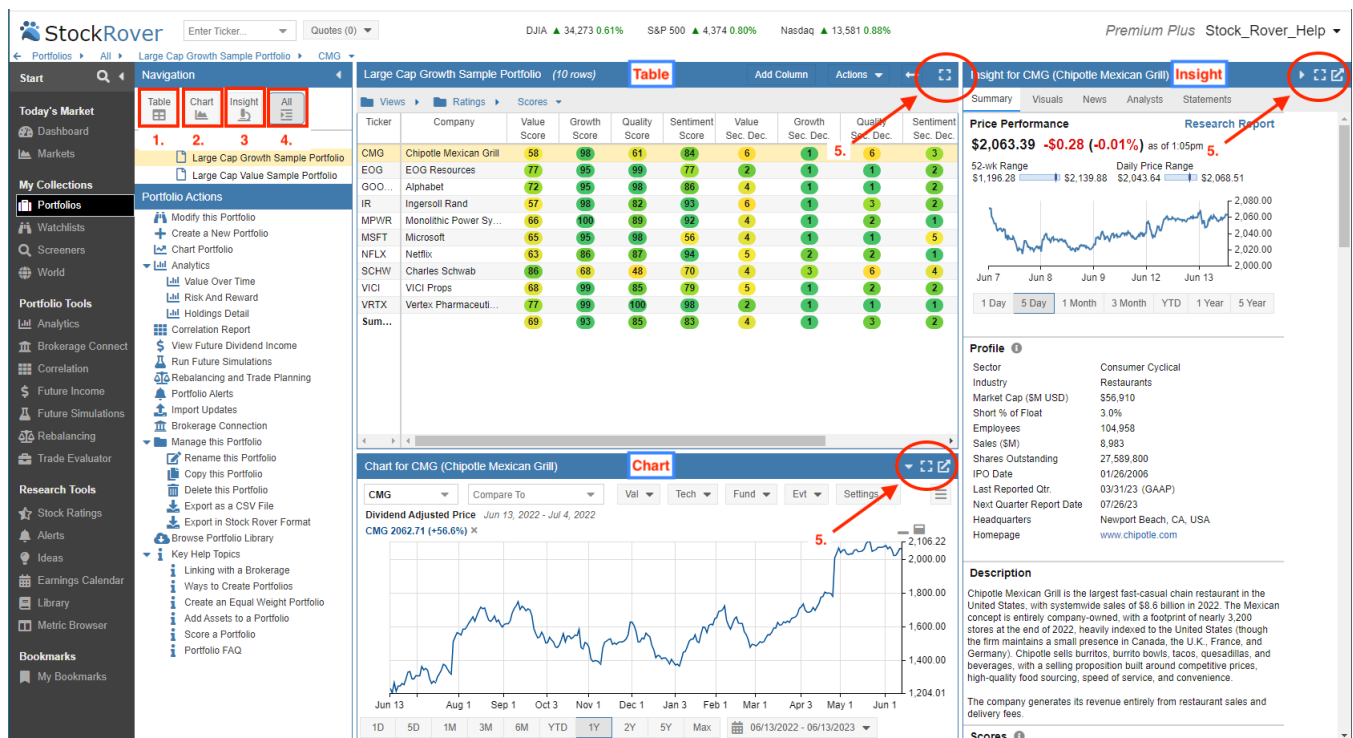
Table – provides a flexible spreadsheet-like paradigm for viewing tickers and their data. Selecting a ticker in the Table updates both the Chart and Insight Panel with data for the ticker.

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.



The screenshot displays the Stock Rover interface for a portfolio named 'Large Cap Growth Sample Portfolio'. The 'Table' view is active, showing a list of companies with various metrics. The 'Chart' view is also active, showing a price performance chart for CMG (Chipotle Mexican Grill). The 'Insight' panel is visible on the right, providing detailed information about the selected ticker, including its price performance, profile, and description.

Company	Value Score	Growth Score	Quality Score	Sentiment Score	Value Sec. Dec.	Growth Sec. Dec.	Quality Sec. Dec.	Sentiment Sec. Dec.
CMG	58	88	61	84	6	11	6	3
EOG	77	95	89	77	2	11	1	2
GOO...	72	95	88	86	4	11	1	2
IR	57	88	82	95	6	11	3	2
MPWR	66	100	89	92	4	11	2	1
MSFT	65	95	88	56	4	11	1	5
NFLX	63	88	87	84	5	2	2	1
SCHW	88	88	48	70	4	3	6	4
VICI	68	89	85	79	5	11	2	2
VRTX	77	89	100	88	2	11	1	1
Sum...	69	83	85	83	4	11	3	2

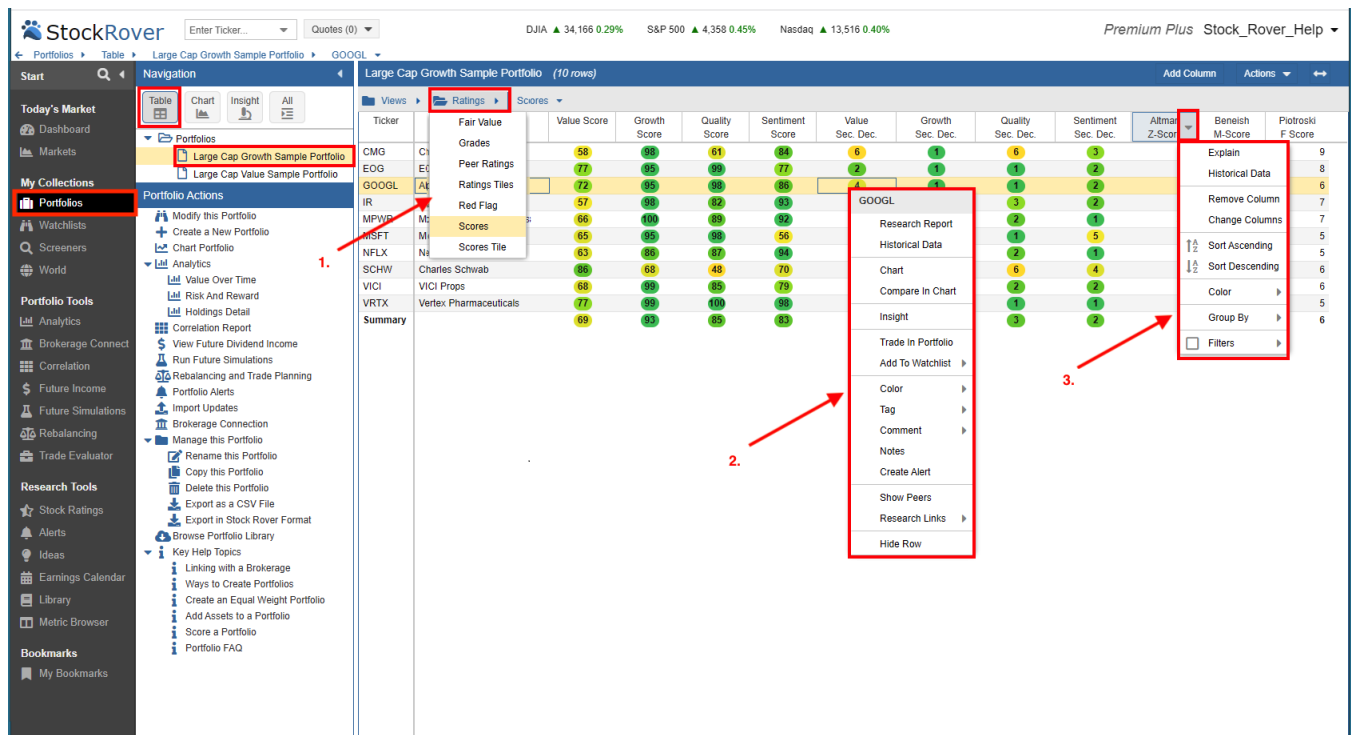
The 'Insight' panel for CMG (Chipotle Mexican Grill) shows a price performance of \$2,063.39, down \$0.28 (-0.01%) as of 1:05pm. The chart shows a price range from \$1,196.28 to \$2,068.51. The profile section indicates the company is in the Consumer Cyclical industry, with a market cap of \$56,910 million and 104,958 employees. The description notes that Chipotle Mexican Grill is the largest fast-casual chain restaurant in the United States, with systemwide sales of \$8.6 billion in 2022.

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.

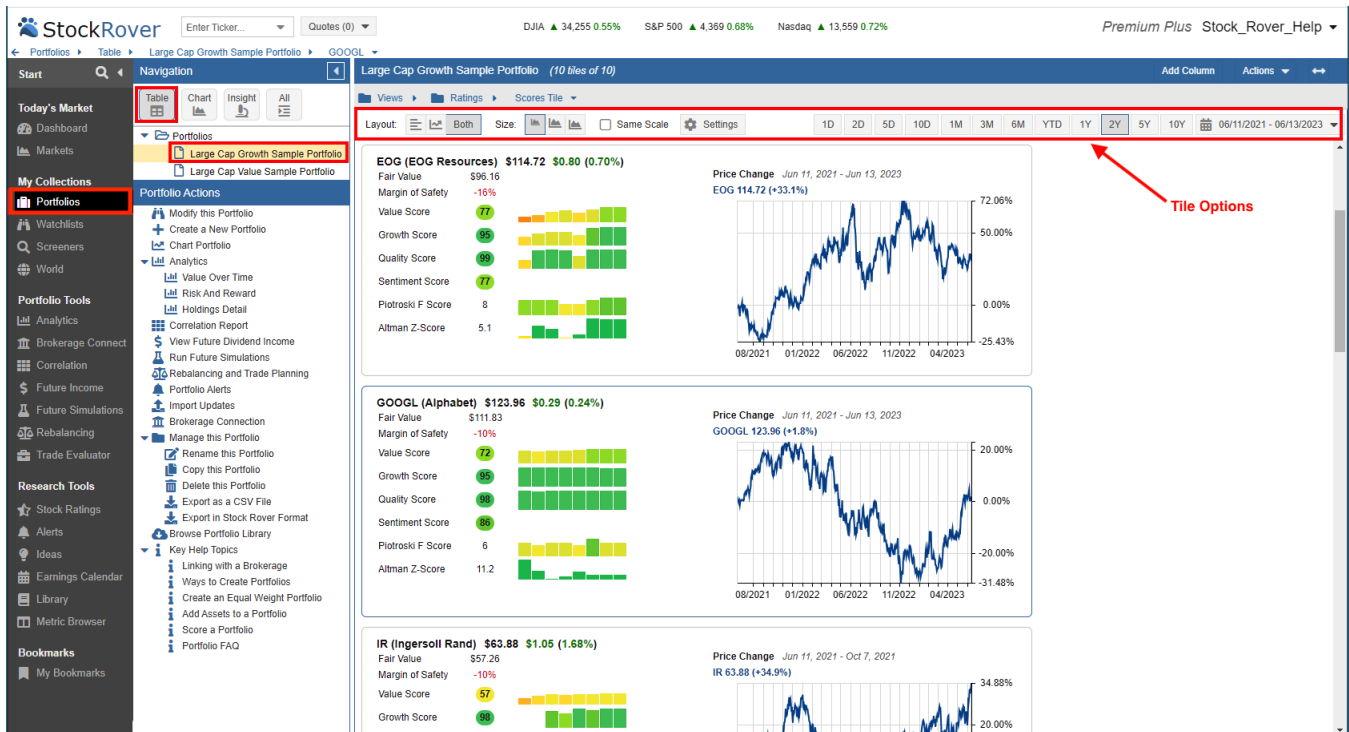


The screenshot displays the Stock Rover interface with the following components and annotations:

- Navigation Pane (Left):** The "Table" view is selected under the "Ratings" folder. A red box highlights the "Table" icon, and a red arrow labeled "1." points to the "Ratings" folder.
- Main Table:** Displays a table of stock data for the "Large Cap Growth Sample Portfolio" (10 rows). The table includes columns for Ticker, Fair Value, Value Score, Growth Score, Quality Score, Sentiment Score, and various financial metrics. A red box highlights the "Scores" view selected in the "Views" dropdown.
- Row Options (Right):** A context menu is open for the "GOOGL" row, showing options like "Research Report", "Historical Data", "Chart", "Compare In Chart", "Insight", "Trade In Portfolio", "Add To Watchlist", "Color", "Tag", "Comment", "Notes", "Create Alert", "Show Peers", "Research Links", and "Hide Row". A red arrow labeled "2." points to this menu.
- Column Options (Right):** A context menu is open for the "Allmax Z-Score" column, showing options like "Explain", "Historical Data", "Remove Column", "Change Columns", "Sort Ascending", "Sort Descending", "Color", "Group By", and "Filters". A red arrow labeled "3." points to this menu.

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.



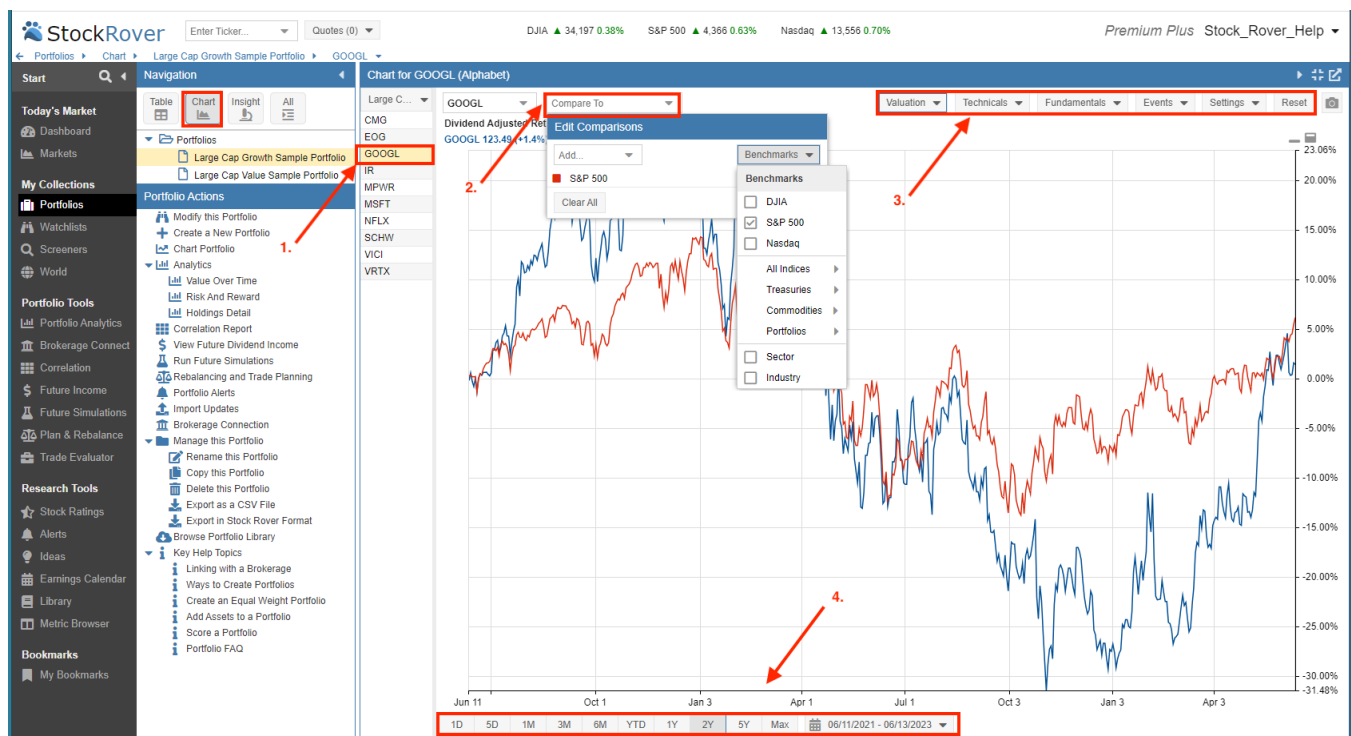
The screenshot shows the Stock Rover interface with the following components:

- Navigation:** A sidebar on the left with sections like 'Today's Market', 'My Collections', 'Portfolio Tools', 'Research Tools', and 'Bookmarks'. The 'Table' view is selected in the top navigation bar.
- Market Indices:** DJIA ▲ 34,255 0.55%, S&P 500 ▲ 4,369 0.68%, Nasdaq ▲ 13,559 0.72%
- Portfolio:** Large Cap Growth Sample Portfolio (10 tiles of 10)
- Views:** Views, Ratings, Scores Tile (selected)
- Configuration:** Layout, Both, Size, Same Scale, Settings, 1D, 2D, 5D, 10D, 1M, 3M, 6M, YTD, 1Y, 2Y (selected), 5Y, 10Y, 06/11/2021 - 06/13/2023
- Tile 1 (EOG Resources):**
 - Price: \$114.72, Change: \$0.80 (0.70%)
 - Metric: Fair Value \$96.16
 - Metric: Margin of Safety -16%
 - Metric: Value Score 77
 - Metric: Growth Score 85
 - Metric: Quality Score 85
 - Metric: Sentiment Score 77
 - Metric: Piotroski F Score 8
 - Metric: Altman Z-Score 5.1
 - Price Change: Jun 11, 2021 - Jun 13, 2023 (+33.1%)
- Tile 2 (GOOGL (Alphabet)):**
 - Price: \$123.96, Change: \$0.29 (0.24%)
 - Metric: Fair Value \$111.83
 - Metric: Margin of Safety -10%
 - Metric: Value Score 77
 - Metric: Growth Score 85
 - Metric: Quality Score 85
 - Metric: Sentiment Score 85
 - Metric: Piotroski F Score 6
 - Metric: Altman Z-Score 11.2
 - Price Change: Jun 11, 2021 - Jun 13, 2023 (+1.8%)
- Tile 3 (IR (Ingersoll Rand)):**
 - Price: \$63.88, Change: \$1.05 (1.68%)
 - Metric: Fair Value \$57.26
 - Metric: Margin of Safety -10%
 - Metric: Value Score 57
 - Metric: Growth Score 85
 - Price Change: Jun 11, 2021 - Oct 7, 2021 (+34.9%)

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.



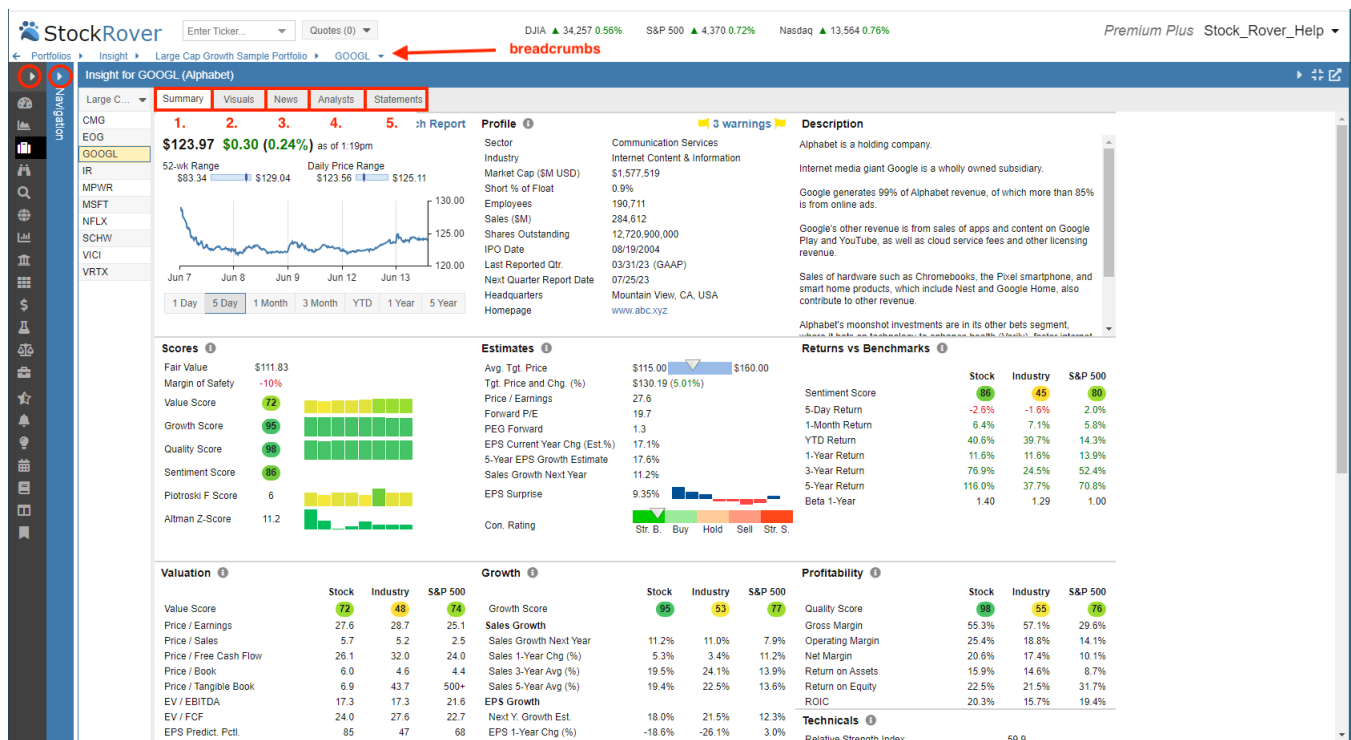
Insight

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 trail 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.

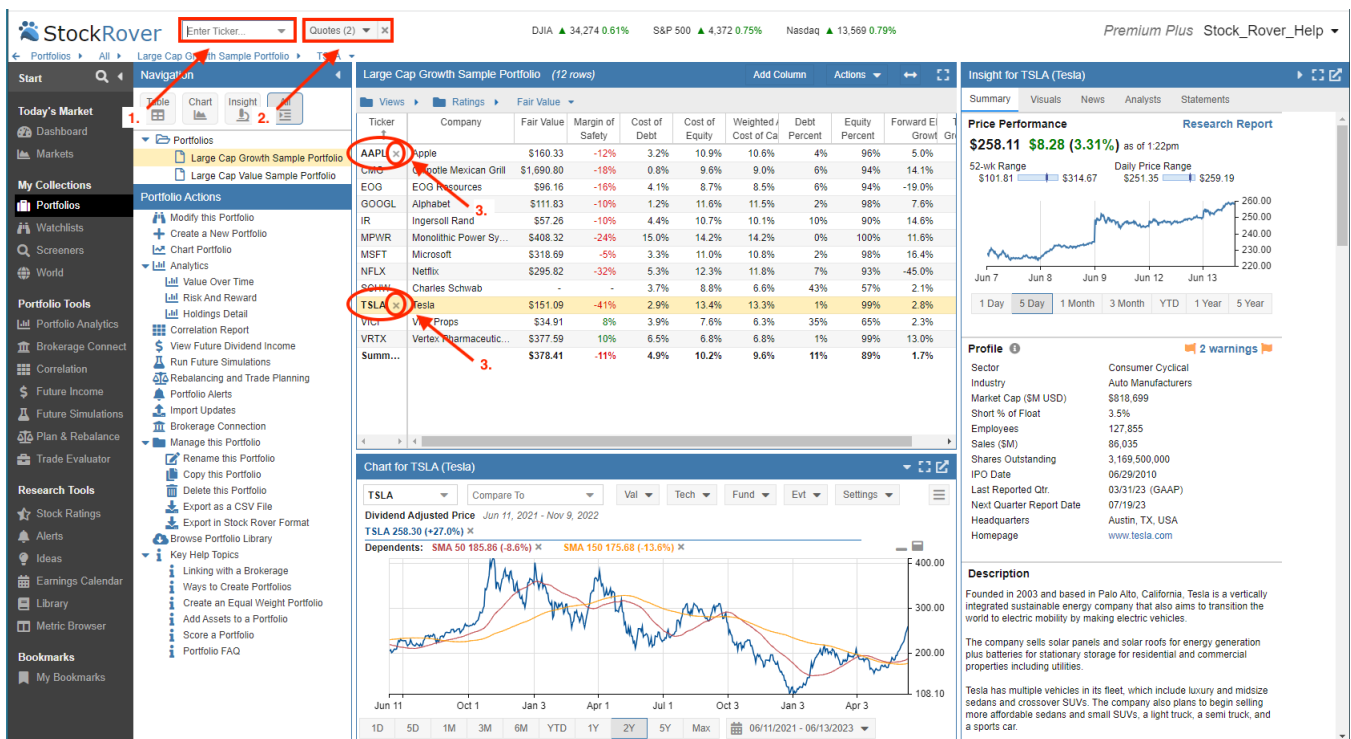


Quotes

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.



The screenshot displays the Stock Rover interface. At the top, there is a navigation bar with a search box labeled 'Enter Ticker...' and a dropdown menu labeled 'Quotes (2)'. Below this is a table titled 'Large Cap Growth Sample Portfolio (12 rows)'. The table columns include Ticker, Company, Fair Value, Margin of Safety, Cost of Debt, Cost of Equity, Weighted Cost of Capital, Debt Percent, Equity Percent, and Forward Growth. The TSLA entry is circled in red and has an 'x' next to it. A red arrow points to the 'Enter Ticker...' box, and another red arrow points to the 'Quotes (2)' dropdown. A third red arrow points to the 'TSLA x' entry. Below the table is a 'Chart for TSLA (Tesla)' showing a price performance chart from June 11 to April 3. The chart shows a price of \$258.30 as of 1:22pm. To the right of the chart is a 'Profile' section for Tesla, including its sector (Consumer Cyclical), industry (Auto Manufacturers), market cap (\$818,699), and other financial metrics. A 'Description' section below the profile provides information about Tesla's business and its electric vehicle fleet.

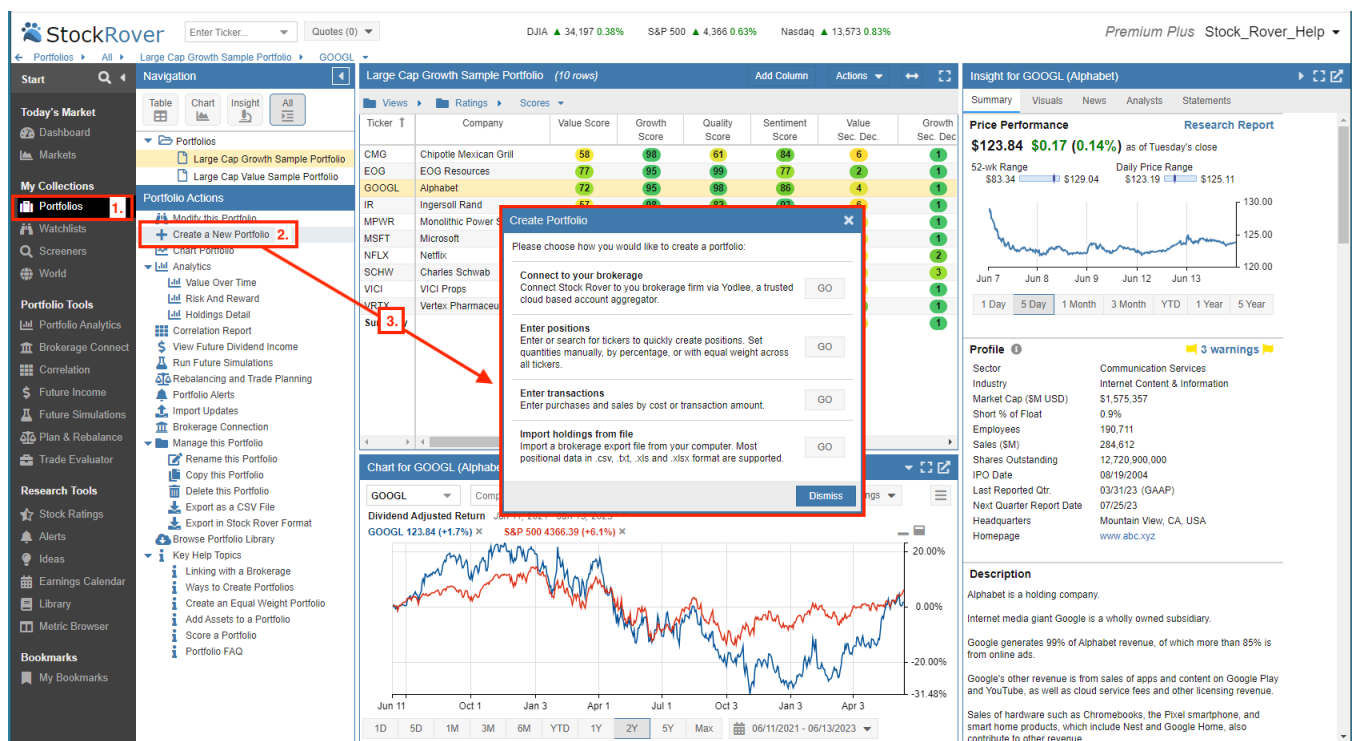
Portfolios, Watchlists, and Screeners

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](#).



The screenshot shows the Stock Rover interface with a 'Create Portfolio' dialog box open. The dialog box has the following sections:

- Connect to your brokerage**: Connect Stock Rover to your brokerage firm via Yodlee, a trusted cloud based account aggregator. [GO]
- Enter positions**: Enter on search for tickers to quickly create positions. Set quantities manually, by percentage, or with equal weight across all tickers. [GO]
- Enter transactions**: Enter purchases and sales by cost or transaction amount. [GO]
- Import holdings from file**: Import a brokerage export file from your computer. Most positional data in .csv, .txt, .xls and .xlsx format are supported. [GO]

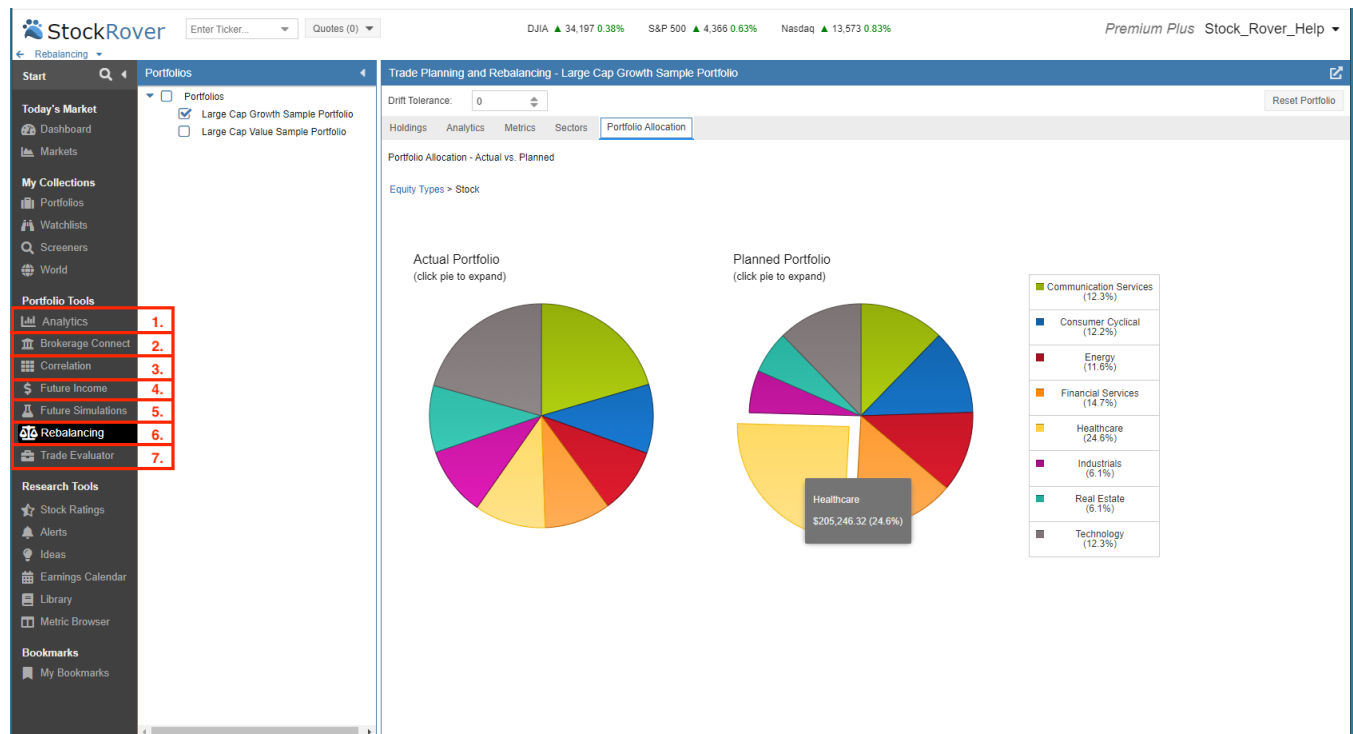
The background shows a table of stock data with columns: Ticker, Company, Value Score, Growth Score, Quality Score, Sentiment Score, Value Sec. Dec., and Growth Sec. Dec. The table lists stocks like CMG, EOG, GOOGL, IR, MPWR, MSFT, NFLX, SCHW, VICI, and VRTX. A chart for GOOGL is also visible, showing a dividend-adjusted return from June 11 to April 3.

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.



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](#).

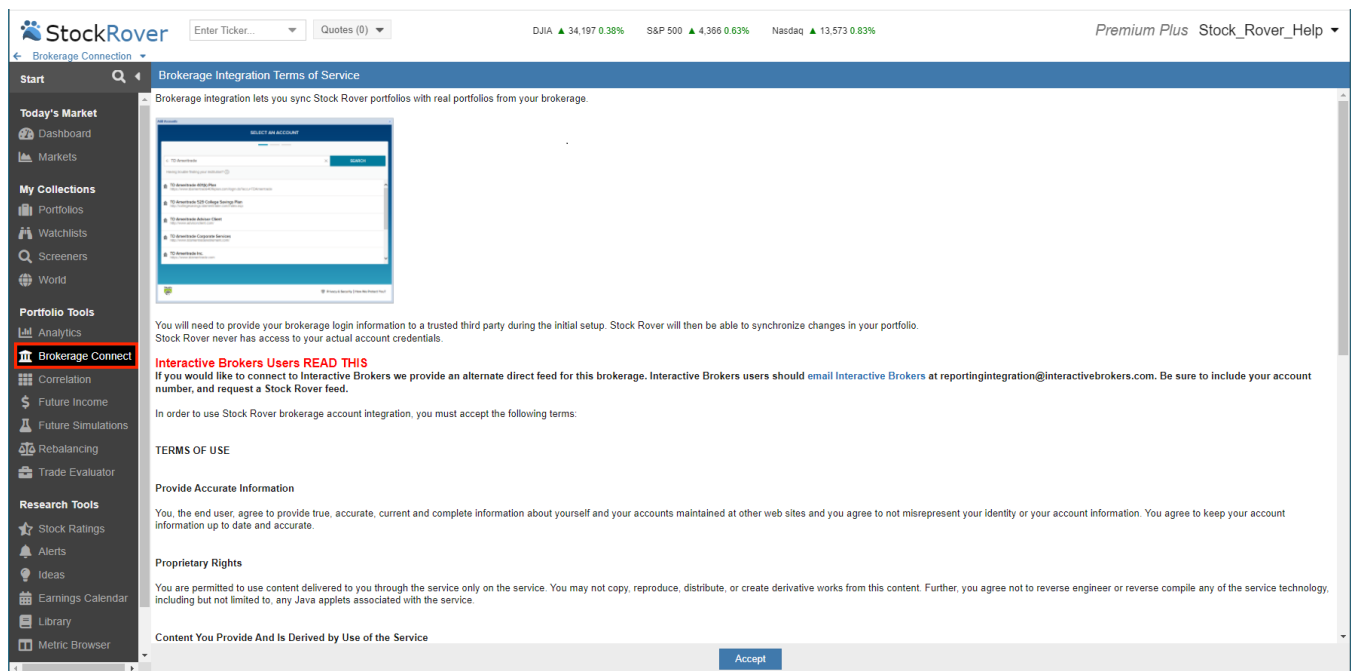
Note: If we don't want to use Brokerage Connect to link Stock Rover to our brokerage, or if the brokerage for some reason is not supported, we can always opt to maintain a [manual portfolio](#).

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.



The screenshot displays the Stock Rover interface with the 'Brokerage Integration Terms of Service' page open. The left sidebar shows 'Brokerage Connect' highlighted in red. The main content area includes a 'SELECT AN ACCOUNT' dialog box, a list of brokerages, and the 'TERMS OF USE' section. The 'TERMS OF USE' section contains the following text:

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 Interactive Brokers at 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

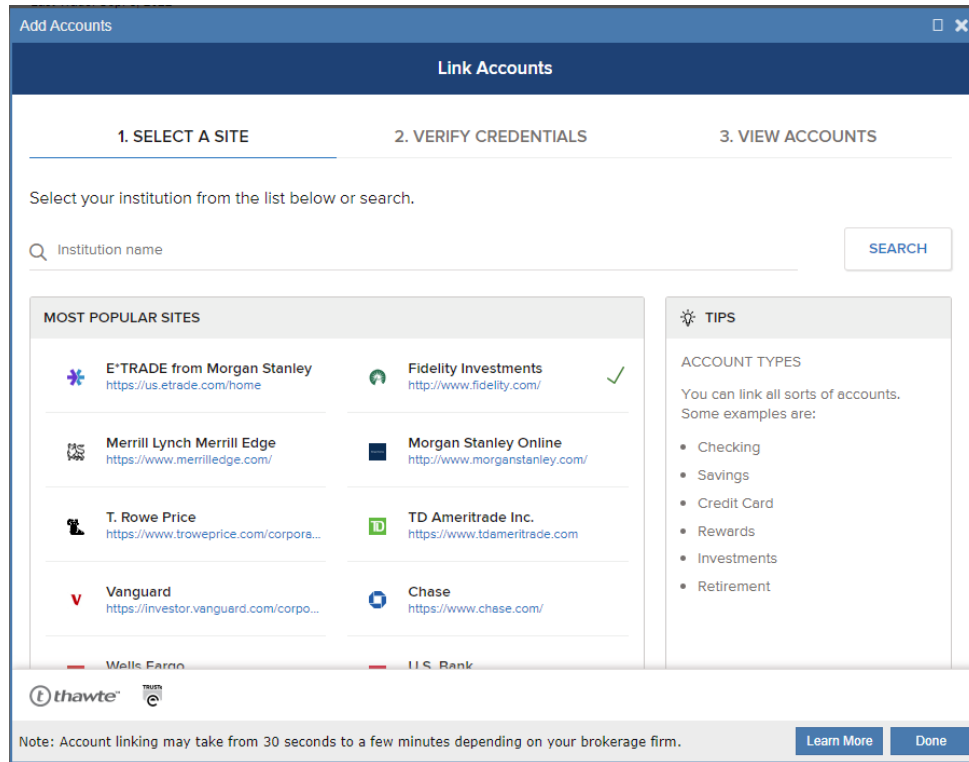
Provide Accurate Information
You, the end user, agree to provide true, accurate, current and complete information about yourself and your accounts maintained at other web sites and you agree to not misrepresent your identity or your account information. You agree to keep your account information up to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

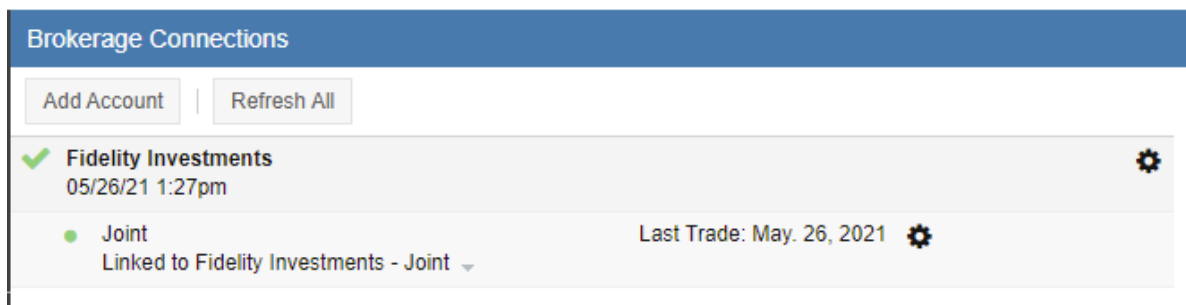
Accept

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.



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.

The screenshot displays the Stock Rover Analytics interface. The top navigation bar shows market indices: DJIA ▲ 34,197 0.38%, S&P 500 ▲ 4,366 0.63%, and Nasdaq ▲ 13,573 0.83%. The main interface is divided into several sections:

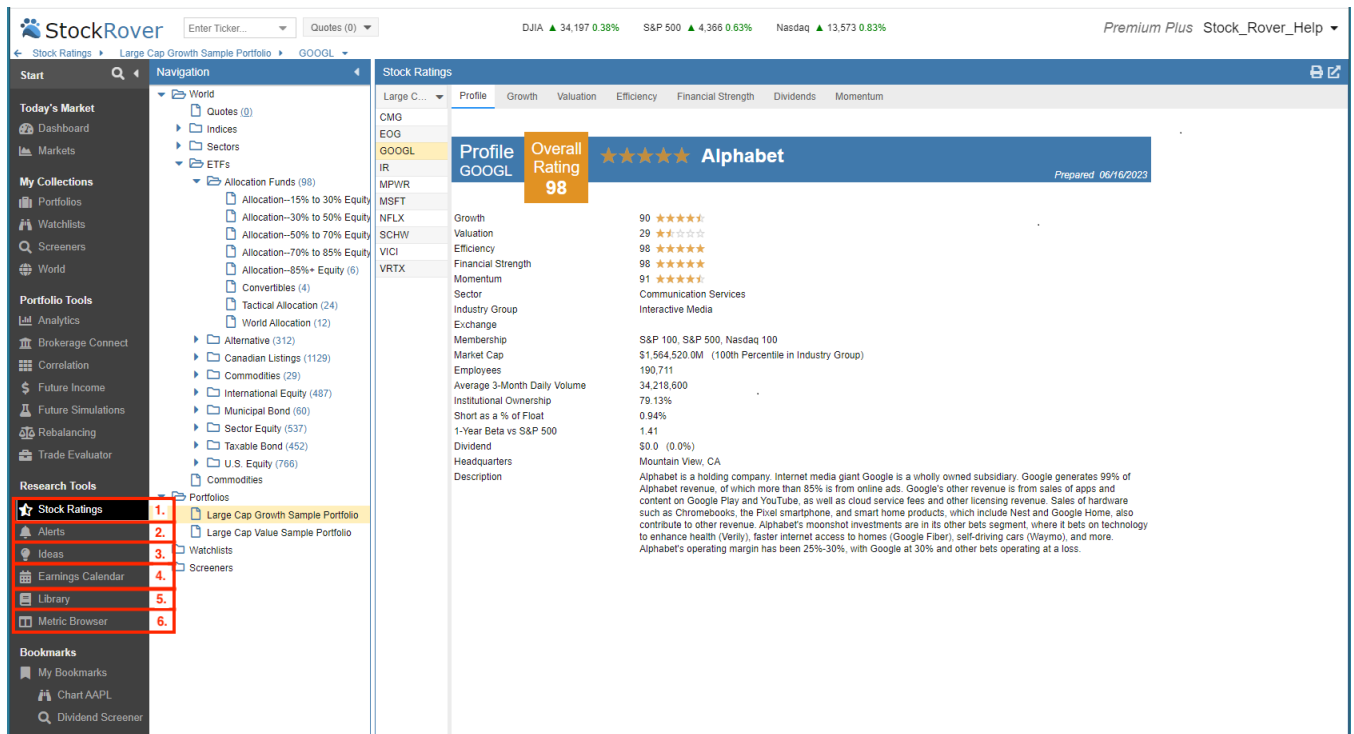
- Left Sidebar:** Contains navigation options like 'Today's Market', 'My Collections', 'Portfolio Tools', and 'Research Tools'. The 'Analytics' option is highlighted with a red box and labeled '1.'.
- Top Navigation:** Includes a search bar, 'Enter Ticker...', and a date range selector set to '2 Year' (labeled '4.').
- Main Table:** A table titled 'Holdings Detail' (labeled '3.') showing a list of stocks with columns for Ticker, Company, Start Value, Change (\$), Inflows/Trade App, End Value, Income, Yield (%), Appreciation (\$/%), Return on Investment, Period Return, Annual Return, Time Weighted Return, Timing, and Unrealized Gain/Loss. A red box labeled '2.' highlights the 'Large Cap Growth Sample Portfolio' in the 'Portfolios' dropdown.
- Bottom Chart Area:** A grid of charts for various sectors including Communication Services, Entertainment, Energy, Oil & Gas E&P, Healthcare, Biotechnology, Real Estate, REIT - Diversified, Technology, Semiconductors, Internet Content & Information, Industrial Machinery, Consumer Cyclical, and Restaurants. A tooltip for GOOGL (Alphabet) is visible, showing performance metrics for the period 06/11/2021 - 06/13/2023.

Research Tools

Overview

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

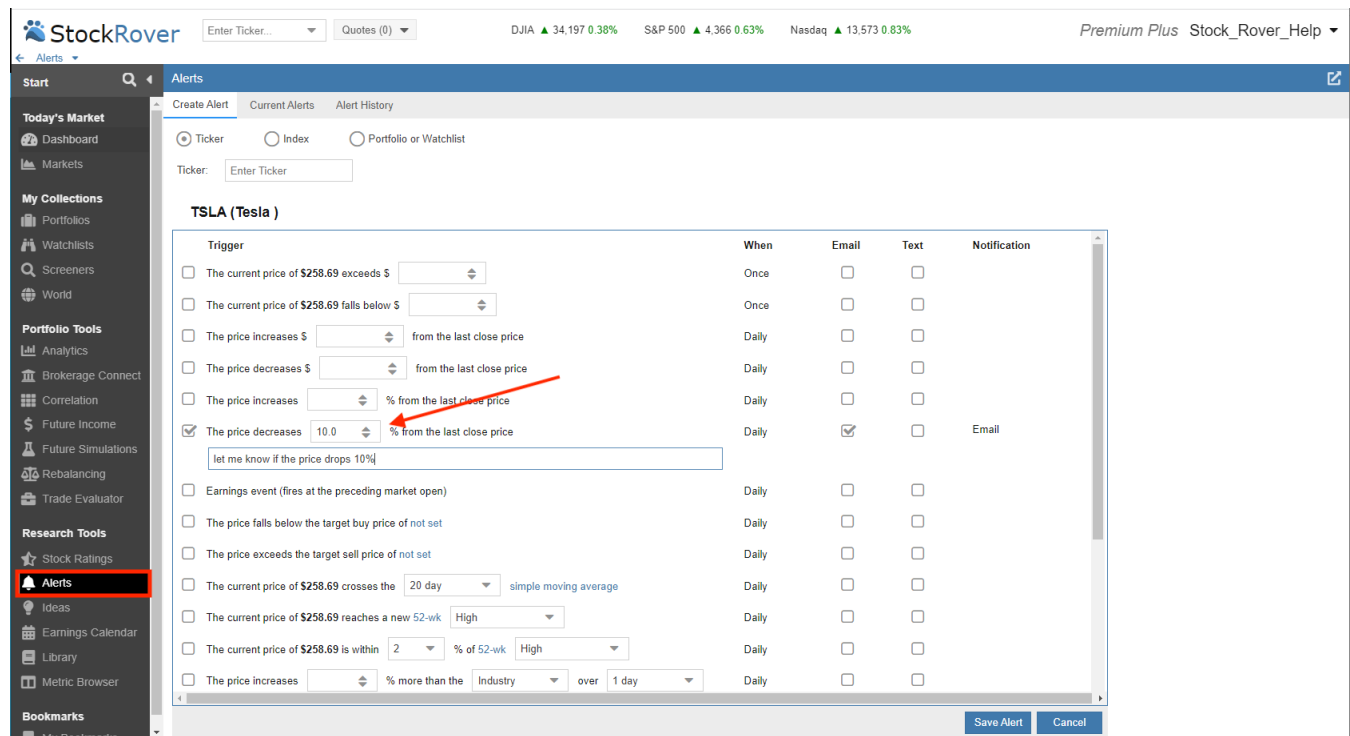
1. [Stock Ratings](#) – the facility provides investors with a simple overall percentile rank of a company within an industry group.
2. [Alerts](#) – receive a text or email alert when something happens in the market of interest to us.
3. [Ideas](#) – helpful tips and tools.
4. [Earnings Calendar](#) – 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.



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.



The screenshot shows the 'Alerts' configuration page in Stock Rover. The 'Alerts' menu item in the left sidebar is highlighted. The main content area is titled 'TSLA (Tesla)' and contains a table of alert triggers. The selected trigger is 'The price decreases 10.0 % from the last close price', which is set to trigger daily and send an email notification. A red arrow points to the '10.0' value in the trigger configuration.

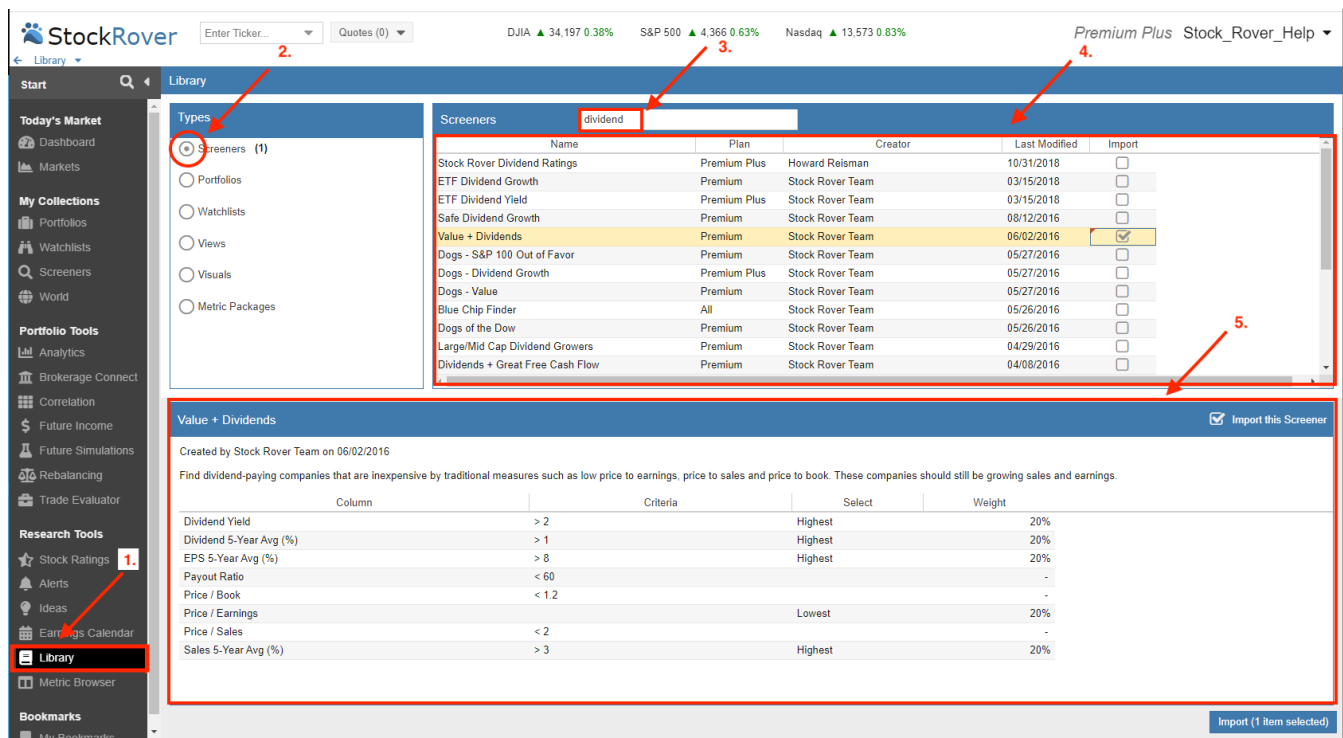
Trigger	When	Email	Text	Notification
<input type="checkbox"/> The current price of \$258.69 exceeds \$ [input]	Once	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The current price of \$258.69 falls below \$ [input]	Once	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The price increases \$ [input] from the last close price	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The price decreases \$ [input] from the last close price	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The price increases [input] % from the last close price	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/> The price decreases 10.0 % from the last close price	Daily	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email
[input: let me know if the price drops 10%]				
<input type="checkbox"/> Earnings event (fires at the preceding market open)	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The price falls below the target buy price of not set	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The price exceeds the target sell price of not set	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The current price of \$258.69 crosses the 20 day simple moving average	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The current price of \$258.69 reaches a new 52-wk High	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The current price of \$258.69 is within 2 % of 52-wk High	Daily	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> The price increases [input] % more than the Industry over 1 day	Daily	<input type="checkbox"/>	<input type="checkbox"/>	

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.



The screenshot shows the Stock Rover interface with the Library section active. The search bar contains the word "dividend". A list of screeners is displayed, with "Value + Dividends" selected. Below the list, the details for the "Value + Dividends" screener are shown, including its description and a table of criteria.

Column	Criteria	Select	Weight
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%

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.

The screenshot shows the Stock Rover interface with a 'Create Bookmark' dialog box open. The dialog box contains the following information:

- Name:** Dividend Screener
- Description:** Show Dividend Growth Screener in the Table using Dividend Growth and Yield View

Below the dialog box, the 'Manage Bookmarks' table is visible:

Order	Name	Destination	Description	Delete
1	Chart AAPL	Watchlists / Chart	Chart the YTD Dividend adjusted return for AAPL and ...	X
2	Dividend Screener	Screener / Table	Show Dividend Growth Screener in the Table using Divi...	X

The 'My Bookmarks' section in the left sidebar is highlighted with a red box, and a red arrow points from it to the 'Create Bookmark' dialog box.