Stock Rover's Advanced Features—January 15, 2015

Advanced Screening

Premium screening is different from Basic screening in three ways: Quant ranking, freeform equations, and historical data. Together they offer a tremendous amount of flexibility and room for fine-tuning. Here's a screener that uses all three functions:

- Consumer cyclical sector
- Sales Per Employee [Now] > Sales Per Employee [2 Years Ago]
- Sales [Now] > Sales [1 Year Ago] **and** Sales [1 Year Ago] > Sales [2 Years Ago]
- EPS 1-Yr Change > 1.05*EPS 5-Yr Average
- Sales 5-Yr Average: 25%
- EPS 5-Yr Average: 25%
- EV/EBITDA: 20%
- ROIC: 20%
- 2-Year Return vs. Industry: 10%

While this screener is useful as is, it is just a sample. Use it as a base for your own screener, or create your own from scratch.

No matter how restrictive your screener is, it cannot stand in for follow-up research. After you generate a list of stocks through a screener, do your due diligence on any stocks in which you are considering investing. For ideas on how to conduct a deep dive on a stock, see these resources:

- [Real World Investment Research: Deep Dive on NuSkin](#) (recorded webinar)
- [Efficient, Seamless Investment Research](#) (recorded webinar)
- [Our blog](#) for in-depth, educational research articles, such as [Priceline vs Expedia: Who will take investors where they want to go?](#)

To explore more screeners and screening techniques, import others screeners from the Stock Rover Library into your account. The Library can be found in the left side of the top toolbar.

Customizable Views

There are 14 default views for you to choose from, that can help you run an organized research process. But, as every investor is different, every investor's research process is different. You can customize your views to suit your needs.

Example: Summary (available in the Library).

You can rearrange the order of columns by dragging and dropping, or by right-clicking a column header and selecting "Modify Columns." Sort on any column simply by clicking its header.

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You can also order the view tabs in a way that makes sense to you. Right-click a view tab to move its position.

Expandable Rows

Expand a row for historical data in columns where it is available. This is a great quick tool to understand critical trends in profitability, valuation, financial health, and more.

To expand a row, click the ▷ button to the left of the Ticker column. The row stays open even if you switch views. To close it up, again hit the arrow button.

Charting Fundamentals & Metric Packages

Use the fundamentals menu to search for any of over 100 fundamentals to chart. We recommend viewing fundamentals in a 5-10 year period for context. Use **metric packages** as a way to see multiple fundamentals charted together.

Chart Shortcuts

Set up the chart how you like it, then click "Create Shortcut."

Example: "Time to Buy?"
- 1 Year period
- Simple Moving Average (SMA)
- Volume
- Money Flow Index (MFI)

In this example, the technicals give some context for whether or not it's time to pull the trigger on a stock I want to buy. I want to see that the stock's price is not too far above its moving averages, that volume looks relatively normal, and that the MFI is below 50 or so. This would give me confidence that the stock's price is not inflated.

Alerts

Set alerts on individual tickers or whole portfolios or watchlists to get notified via text or email (or both) when a designated threshold is crossed. If you set an alert on a portfolio or watchlist, you'll be notified when any ticker in that population crosses the threshold.

You can use alerts as a way to know if you are approaching a good buy or sell point, as a way to learn of news events that are causing extra trading activity, or simply as a way to keep tabs on certain stocks when you aren't regularly checking quotes or signing into Stock Rover.

Some examples of alerts you could set:

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- Ticker price **crosses a specific target price**—once you've decided on a target price for a stock, this alert saves you the trouble of manually checking in on the stock's price.
- Ticker price **crosses the 50-day moving average**—depending on the direction of the cross, this may indicate a good buy or sell point.
- Ticker **price changes more than 5% than its industry's** combined price movement over a week—depending on the company and its industry context, this may be an unusual deviation that begs investigation
- Ticker **price falls below a certain P/E**—this may indicate that the stock is valued in a way that matches your appraisal and it could be a good time to buy.
- Any ticker in a portfolio or watchlist **reaches a new 52-week high or low**—this may be a good time to look into what is causing this trend.
- The volume for any ticker in a portfolio or watchlist **exceeds the 10 day average volume by 50%**—this suggests that there has been a news event that is causing additional trading activity for this stock.

The specific values you choose for your alerts depend on your own analyses and expectations. If you set low bars or lots of alerts, expect to be alerted frequently. Note there is a limit to how many text messages we'll send in a day, but no limit to the number of email alerts. Alerts that occur at the same time will be batched together.

Portfolios in the Table, Insight Panel, and Chart

Select 'My Portfolios' (or a portfolio folder, if using) in the Navigation panel. You'll see the portfolios compared as a whole in the Table. Recommended views for comparing portfolios:

- Portfolio Performance
- Historical Returns
- Returns vs. S&P 500
- Valuation
- Profitability

The portfolio row that is selected in the Table will load in the Insight panel. You'll see:

- **Portfolio allocation pie chart—**click on the sections to drill down to another level of detail.
- **Top 5 Movers table**—includes best performance, worst performance, and most actives (highest trading volumes) for all stocks in the selected portfolio. This table is customizable! Change the timespan, and add columns that you want to see for your portfolio movers. Suggested column additions:
  - o Average Volume (3 Months)
  - o 3-Month Return vs. Industry
  - o 1-Month Return vs. S&P 500
  - o Relative Strength Index
- **News**—see a combined news feed for all the tickers in the selected portfolio.

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You can also **chart whole portfolios together**, either by right-clicking them in the Navigation panel or Table and selecting "chart," or using the Benchmarks dropdown menu in the Chart toolbar. In the Chart's Events menu, you can select "Portfolio Activity" to show where along the chart lines a trade occurred. You can also add in an index or index proxy ETF to compare your portfolios against. Use the **baseline function** to see relative performance.

Portfolio Reporting

For our most detailed, in-depth, and accurate analytics, open the Portfolio Reporting window in the top left of the toolbar.

In the Portfolio Reporting window, select the portfolios you wish to analyze from the left panel. Select the time period you wish to analyze from the top buttons and menus. We recommend using multiple time periods during your analysis to gain a clearer understanding of how your investments have been treating you.

There are four tabs, each offering a different lens through which you can analyze your investments:

- **Value Over Time**—Basic stats on your portfolio.
- **Risk & Reward**—Factors in the riskiness of your investments to provide context for the returns you are making. You want to see returns that are well scaled to the amount of risk you are taking.
- **Holdings Detail**—See exactly how each stock in all selected portfolios has performed and contributed to your total return (multiple lots will be combined).
- **Correlation**—See how correlated the tickers in your portfolio are, and test out stocks you are considering buying. Just like sector allocation, correlation can be used as a tool to help you diversify your portfolio. Use the Research Tickers box to add tickers to the matrix and use the "**Hide Row**" feature to see how your portfolio's correlation mix would change if you removed a stock.

Portfolio Trade Modeling

Right-click a portfolio in the Navigation panel and select "Model" for our portfolio modeling window. Portfolio modeling allows you to explore alternative versions of your portfolio, so you can:

- **Test your trading ideas**. How will the trades you are considering affect your portfolio's sector balance, valuation, and returns (based on current and historical data)? Before committing real dollars, model a trade in Stock Rover to make sure the theory is sound.
- **Learn how your portfolio would have done had you made different decisions**. What if you had bought X instead of Y? What if you had bought more of X and less of Y? You can't go back in time, but you can gain insight into how to better optimize a portfolio. Questions you could explore are:

- o Did one type of investment strategy (e.g. growth vs. value) turn out better than others?
- o How did buying x rather than y affect portfolio performance, maximum draw down and risk adjusted performance
- o How does the actual portfolio vs. the model portfolio compare in important metrics (performance, drawdown, risk adjusted performance) over different time periods

Notes Facility

Right click any ticker in the table and select "Add Research Note." Then create your note. It will be automatically time-stamped and tagged with the ticker name as a keyword. You can print all of your notes together to keep an offline copy.

When you open up Notes in the Insight panel, it automatically filters on whatever ticker you have selected in the Table. To see all of your notes, clear that filter by clicking the 'x' in the searchbox.

We recommend keeping notes! Not only do they make it easy for you to jot down ideas, but over time they can help you develop a history of your research process, which can be instructive. If you ever think "How did I pick that stock?" you'll find clues to that in your notes history. Notes

Tagging & Grouping

Similar to notes, you can **tag tickers with a keyphrase** (only one tag per ticker). You can view your tags by adding the Tag column to your view. Tag a ticker by right-clicking it in the Table and selecting 'Tag' or by adding the Tag column via the Add Column searchbox.

You can then **group the Table by tag**. The advantage of these two features together is that it allows to create a custom cataloguing system that you can use to isolate and compare groups of securities. For example, you could create tags of different strategies you are using to pick stocks and then compare those strategy groups in different views of the table. Use the Summary line to see how groups perform as a whole.

Assorted Other Tips

- Undock the Chart, Insight panel, and Portfolio Reporting windows by clicking the
- Right-click a column header for the "Explain" window. Here you'll get a definition of the metric with benchmark values for context. A great tool for learning about different metrics!
- Columns in almost all tables in Stock Rover can be reordered by dragging and dropping, and sorted by clicking on column headers.
- Apply quant weights to any portfolio or watchlist by right-clicking the quant screener and selecting "Apply to Portfolio/Watchlist." The stocks in that list will then be ranked according to your quant criteria!

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