

Efficient, Seamless Investment Research with Stock Rover

Check the Health of the Markets

- Check Summary tab for the day's market summary
- Put all indices in Table by clicking "Indices" in Navigation panel
 - See Top Movers in Insight panel
- Chart S&P 500 by clicking on the row—if the chart is linked it will be added to the Chart.
- Add in SMA to see trends

Check Value vs. Growth

- Look in Navigation Panel→ETFs→Domestic Diversified for small, mid, and large cap for both value and growth (6 ETFs total)
- Create Watchlist of six ETFs and chart them against the S&P

Efficiency Tips in this Section

- ✓ Click parent item in Navigation panel to see constituent elements in Table
- ✓ Link the chart and the Table
- ✓ Use categorized ETFs to quickly find proxies for segments of the market
- ✓ Quickly add a column to the Table with Add Column button
- ✓ Sort the table by clicking a column header
- ✓ Add a ticker to a watchlist by right-clicking the ticker
- ✓ Save a watchlist of ETFs to compare against the S&P
- ✓ Set the S&P 500 as a baseline in the chart to see relative performance
- ✓ Use multi-select to chart several tickers at once

Screen for Growth

- Go to Investor Library and browse (or search)
- Import Mid Cap Rockets
 - Note: this is a quant screener, which is a Premium-only feature, but Basic users can use the non-quant features of the screener
- Save screener results as a watchlist
- Apply quant to watchlist
- Chart relative performance of these stocks against the S&P 500
- Chart SMA on top of stocks
- Remove stocks that don't look good
- Color or tag stocks that look particularly interesting
- Group stocks by color, create new watchlist with colored stocks

Efficiency Tips in this Section

- ✓ Add Navigation panel tooltips (Options→Tooltips)

- ✓ Search the Investor Library for pre-built screeners
- ✓ Save screener results as a watchlist
 - Add a date to the description as a bonus backtest
- ✓ Rank a watchlist with a quant
- ✓ Scroll through the charts of the stocks in a watchlist
- ✓ Add in both sector and industry to see how the stock compares
- ✓ Easily remove a stock from a watchlist by right-clicking
- ✓ Color or tag stocks by right-clicking
- ✓ Group stocks by color or tag by right-clicking a column header
- ✓ Multi-select stocks and right-click to create a new watchlist

Screen for stocks that are out of favor

- Go to Investor Library and import the “Revert to Mean” screener
- Chart screener with different time periods (note: does *not* backtest)
- Run screener
- View Analyst Estimates for selected stock in the Detail tab
- Sort by “EPS Next Year Estimate Trends” metric in the Table
- Take stocks with current EPS estimate v. 90-days ago > 0 and tag
- Switch to my custom-made “Versus Industry” View
- Sort by P/E Industry Decile
 - Use Column Info Box to see description and find related metrics
- Tag multiple stocks at once
- Save all tagged tickers as a watchlist

Efficiency Tips in this Section

- ✓ Chart a screener (does not backtest) to check it
- ✓ See the Analyst Estimates in the Detail tab
- ✓ Sort by EPS Next Year Estimate Trends to find just stocks whose EPS has been revised upwards
- ✓ Create custom View with the specific metrics you want
- ✓ Use the column info box for metric descriptions
- ✓ Tag several tickers at once with multi-select
- ✓ Save all tagged tickers as a watchlist or portfolio by selecting “Manage Tags”
- ✓ Delete a tag to remove all the tags from tickers at once

Look at Sector Performance

- Chart all sectors and compare against a flatlined S&P 500
- Create a note with best sectors (*Premium feature*)
- Click into sector, sort industries by best return versus sector
- Find the top movers in the Insight panel from the top-performing industry

- Find best performing stock in best-performing industry with the Top Movers in the Insight panel
- Find competing stocks via the Peers tab

Efficiency Tips in this Section

- ✓ Chart all sectors against the S&P 500 in any time period
- ✓ Create a note with any observations (Premium feature)
- ✓ Sort Industries in the Table
- ✓ Find top movers in industry with the Insight panel
- ✓ Add a research ticker straight from the Top Movers section
- ✓ View all stocks in the same industry in the Peers tab
- ✓ Add, filter, and sort columns to the Peers tab
- ✓ Add research tickers from the Peers tab

Miscellaneous Tips

- ✓ Use back button in Table
- ✓ Use research box drop-down for history

Thanks for watching! Please email erica.reisman@stockrover.com with any feedback.