Getting Set Up On Stock Rover

Here is a list of tasks to get you moving and grooving in Stock Rover. There is an easy way to do everything on this list. Start with these top 10, then move on to the next page to master even more.

If you get stuck, consult our website help pages or videos, or email support@stockrover.com.

1. Add three stocks to the Table
2. Chart all of them at the same time (hint: try multi-selecting their rows)
3. Add an event, a technical, and a fundamental to the Chart
4. Sort the Table by any metric
5. Filter the stocks in the Table by any metric
6. Save the filter (or filters) together as a screener
7. Modify the screener further, or modify any existing screener
8. Save the screener results as a watchlist
9. Link to a news story about a stock
10. Switch to a new Table View (tabs at the top of the Table)

Ready for more?

These next steps will get you well on your way.

1. Add a column to a View
    a. Bonus points: Use the “Explain” feature to find a column that is related to other metrics in the current View
2. Create a portfolio, or modify a sample portfolio
3. Find the portfolio allocation pie chart (hint: see the Insight panel)
4. Chart a portfolio
5. Add the S&P 500 to the Chart and set it as a baseline (AKA “flatline” it)
6. Clear the Chart
7. With the Chart cleared, chart all sectors at the same time
8. Import a View from the Library
9. Open a sector in the Table
    a. Now, open one of its industries in the Table
10. Find analyst estimates for a stock in the Insight Panel
11. Link to the company’s homepage
12. Link to the company’s annual or quarterly reports
13. Find the list of a stock’s industry peers
14. Turn on all tooltips through the Options menu and see what they do
15. Chart a stock in candlesticks (only one stock can be charted for candlesticks to work)
16. Zoom in on the chart, then zoom back out
17. Create a custom time period for the chart
18. Move a secondary ticker in the chart into the primary ticker position (i.e. leftmost spot)
19. Color rows in the table
20. Group the table by color
21. Add a custom research link
22. Create a research note about a stock (*Premium*)
23. Open the Portfolio Reporting window (*Premium*)
    a. Explore each tab
    b. Add a ticker to the Correlation matrix
24. Run a Quant screener (*Premium*)—are you familiar with any of the top stocks? Try starting the research process on these stocks in Stock Rover, maybe there’s a keeper!