Stock Rover is a powerful platform for finding, comparing, and tracking stocks, ETFs, and funds. It streamlines the stock research process in a highly interactive and customizable user interface (UI). Although Stock Rover is accessible through your Internet browser, its web 2.0 technology allows it to feel and act more like an installed application, where you can right-click, drag-and-drop, resize panels, and more.

Read on for a quick introduction to the Stock Rover paradigm. Once you get familiar with the layout and learn a few simple tricks, you’ll be well on your way to smarter investing!

Like to learn by doing? After familiarizing yourself with the screen layout on the next page, head to page 14 for a list of simple tasks to test and expand your working knowledge of Stock Rover.
THE STOCK ROVER USER INTERFACE

### Market Summary

<table>
<thead>
<tr>
<th>Index</th>
<th>Last Close</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>DJIA</td>
<td>17,404.85</td>
<td>-210.32</td>
<td>-1.19%</td>
</tr>
<tr>
<td>S&amp;P 500</td>
<td>2,545.23</td>
<td>-19.95</td>
<td>-0.79%</td>
</tr>
<tr>
<td>NASDAQ</td>
<td>9,187.17</td>
<td>-30.30</td>
<td>-0.33%</td>
</tr>
</tbody>
</table>

### Quotes (a total)

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Last</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAP</td>
<td>173.76</td>
<td>1.42</td>
<td>0.82%</td>
</tr>
<tr>
<td>AAL</td>
<td>115.92</td>
<td>-0.61</td>
<td>-0.52%</td>
</tr>
<tr>
<td>AMR</td>
<td>10.90</td>
<td>0.08</td>
<td>0.74%</td>
</tr>
</tbody>
</table>

### Navigation Panel

- Markets
- Indices
- S&P 500
- Stock Screener

### Chart for AAL (American Airlines Group)


### The Table

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Last Close</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAL</td>
<td>43.15</td>
<td>-12.02</td>
<td>-12.02%</td>
</tr>
<tr>
<td>CPB</td>
<td>50.28</td>
<td>19.76</td>
<td>61.76%</td>
</tr>
<tr>
<td>UNH</td>
<td>22.57</td>
<td>-6.01</td>
<td>-23.07%</td>
</tr>
</tbody>
</table>

### Insight Panel

- Financial Health Grade
  - Address: 4335 Amon Carter Boulevard, Fort Worth, TX, USA, 76115
  - Home Page
  - Ownership and Officers

### The Chart

- Price Chart: Aug 11, 2015
- Performance
  - 5-Day Return: 12.02%
  - 1-Month Return: 9.52%
The Start Menu is a customizable list of all tasks in Stock Rover. This is a great place to go to initiate all kinds of actions, from setting up stock alerts to creating a screener.

The Market Summary is a quick table showing the market’s current gains/losses.

The Quotes Box is a running list of quotes with current gain/loss information. You can also add portfolios and watchlists (just search for them by name in the Add Ticker box). Tickers in the quotes box can also be viewed in the Table for deeper research and comparison.

The Navigation Panel controls the dataset you are viewing in the Table. You can select parent and child items—for example, select “Portfolios” to see whole portfolios compared or select a particular portfolio to see its holdings.

The Table is a flexible, interactive spreadsheet. Columns containing financial metrics (over 275 to choose from!) are organized into “views,” which are accessible as tabs at the top of the Table.

The Chart allows you to visually explore price performance and directly compare different items, such as a ticker, index, portfolio, or screener. Plus it’s loaded with technicals, fundamentals, and other options to help you analyze investments.

The Insight Panel is a multi-functional panel offering a wide variety of information and tools. The row selected in the Table controls what you see here.

Account Settings and Help menus let you set account preferences, change your membership plan, contact our support team, or link to the copious help resources on our website.
**Basics of Navigation**

The row selected in the Navigation panel populates the Table rows:

So, for example, if you wanted to **run a screener**, you could simply select its row in the Navigation panel to see its results load in the Table.
**BASICS OF NAVIGATION**

In the *Quotes Box*, if you have “Include in Table” checked, these tickers will appear as rows in the Table alongside whatever dataset you have selected from the Navigation panel:

This makes it easy to quickly add in tickers, portfolios, or watchlists for comparison against other populations of stocks. Simply de-select “Include in Table” to remove the rows from the Table without deleting quotes from the Quotes Box.
**BASICS OF NAVIGATION**

If you want to see only quotes in the Table, select the row “Quotes” from the Navigation panel. When viewed in the Table, quotes are called research tickers:
BASICS OF NAVIGATION

The row selected in the Table populates the Insight panel:
BASICS OF NAVIGATION

The row selected in the Table also populates the Chart:

![Chart](image)

You can **unlink** the Table and Chart via the Chart’s Settings menu. This allows you to work in the Table without affecting what you see in the Chart.
BASICS OF NAVIGATION

To add other items to the Chart, you can enter tickers, portfolios, and more in the Compare box:

And don’t forget to test out what that little blue button next to the ‘X’ does!
BASICS OF NAVIGATION

You can also add to the Chart by right-clicking any item in the Table or Navigation panel and selecting “Chart”:

As you can see above, right-clicking gives you a lot of useful options. In fact, right-clicking is a crucial way to explore Stock Rover. The right-click menus can be reached without a right click button just by hovering over an element so that a drop-down carrot appears, like this one:
**BASICS OF NAVIGATION**

The **Start Menu** is another great way to find Stock Rover tasks and features. Use the buttons and searchbox/drop-down menu to find the tasks you are looking for. Once you are more familiar with Stock Rover, customize the menu’s buttons so that it contains your most commonly used tools.
**Basics of Navigation**

**ToolTips** are informational boxes that allow Stock Rover to seamlessly deliver information to you. For example, if you hover over a graphical metric in the Table like Yearly EPS, you’ll get a tooltip with much more detail than what is shown in the Table cell alone:
BASICS OF NAVIGATION

If you hover over a ticker in the Table, Quotes Box, or Chart, you’ll see a “ticker info tooltip” like the one below:

The beauty of this particular tooltip is that it allows you to reference basic stats about any ticker in an instant, without even having to click. If you don’t want to see ticker info tooltips, you can turn them off in the account preferences window.
OKAY, LET’S ROVER!

While of course there is more we could teach you about Stock Rover, we think the best way is to learn the program is by using it. So we’ve created a few lists of simple tasks for you to try out. Once you get through these, move on to the next page for more. Keep in mind that there are often multiple ways to accomplish the same task in Stock Rover, and there is at least one easy way to do everything on this list.

If you get stuck, consult our website help pages, video library, or our support team. See the Help menu in the top righthand corner of the Stock Rover screen to access these resources.

Ready? Give these a try…

1. Open the Dow Jones Industrial Average (DJIA) index in the Table.
2. Add three stocks to the Quotes Box and check “Include in Table,” so that they can be compared with the tickers in DJIA.
3. Now, show only those three stocks in the Table (hint: remember the Navigation panel is what controls the Table contents).
4. Chart all three stocks at the same time (hint: try multi-selecting their rows).
5. Add an event, a technical, and a fundamental to the Chart.
6. Add the S&P 500 to the Chart.
7. Now, set the S&P 500 as a baseline (AKA “flatline” it). This is sort of a hidden feature, but it’s easy once you know where it is!

Good start! See the next page for more getting started tasks that will help you develop a workflow in Stock Rover.
DEVELOPING A WORKFLOW IN STOCK ROVER

Now let’s do some more work in the Table:

1. Switch to a new Table view (tabs at the top of the Table).
2. Add a column to this view.
3. Sort the Table by any column.
4. Filter the stocks in the Table by any metric in your current view.
5. Save the filter (or filters) as a screener (hint: see the Table’s Actions menu).
6. Add more criteria to this screener. For example, Dividend Yield > 2 (tip: notice how you can preview the number of passing stocks as you add filters to your screener).
7. When you’re done modifying the screener, click “Update.” The screener results will now load in the Table.
8. Save these results as a watchlist.

Nice work! We hope these tasks have given you a sense of how you can easily customize Table views and your screeners to suit your needs. See the next page to discover more actions, like charting a portfolio, finding industry peers, and charting candlesticks.
DEVELOPING A WORKFLOW IN STOCK ROVER

Now to explore just a few of the portfolio tools available in the Basic membership…

1. Display all portfolios in the Table.
2. Find the portfolio allocation pie chart (hint: see the Insight panel).
3. Find portfolio news and open a news story about a stock.
4. Chart a portfolio.
5. Chart all portfolios (hint: use the “Portfolios” row in the Navigation panel).

And some of the charting functions…

1. Clear the Chart. Then chart a single stock.
2. Chart the stock in candlesticks.
3. Now, switch to Price %.
4. Add a ticker to the Chart via the Compare box.
5. Zoom in on a section of the Chart (hint: select a section with your mouse).
6. Zoom back out.
7. Change the Chart period.

Go you! See the last page to explore sectors, get analyst earnings estimates, compare to peer stocks, and more.
DEVELOPING A WORKFLOW IN STOCK ROVER

Let’s dig in deeper on a single stock. Here are a variety of actions you might take when you are investigating a stock:

1. Open a sector in the Table.
2. Then, open one of its industries in the Table.
3. Change the stock that is displayed in the Insight panel.
4. Link to the company’s homepage.
5. Link to the company’s annual or quarterly reports.
6. Find analyst estimates for the stock (hint: see the Detail tab).
7. Open the Peers tab of the Insight panel.
8. Filter peers on any metric.
9. Now, load the filtered list of peers in the Table.
10. Color a few rows in the table.
11. Group the table by color.
12. Browse the Library for screeners, watchlists, sample portfolios, and even Table views (hint: use the Start menu to open the Library).

Go ahead and import a few items into your account!

You’ve now mastered a huge variety of actions in Stock Rover, great job! We encourage you to keep testing out different actions on your own to discover even more. To try out everything Stock Rover has to offer, including advanced screening and portfolio analysis tools, activate a 14-day free trial of Stock Rover Premium. To do this, select “Begin Premium Trial” in the Account drop-down menu in the top righthand corner of the screen. No payment information is necessary to begin the trial. Learn more at http://www.stockrover.com/about-premium-trial.html. Enjoy!