

Overview of Stock Rover — Webinar Outline

A Few Basics

- 5 main panels can be resized
- Right-click menus
 - Can also be accessed by hovering over an element for drop-down button
 - These menus are essential for exploring Stock Rover

Toolbar (top of screen)

- Portfolio Reporting (Premium)
 - Contains in-depth portfolio analytics
- Investors' Library
 - Share with the Stock Rover community
- Options
 - Includes a variety of Stock Rover settings, plus your account information
- Videos
 - Links to our Video Library in a new browser tab
- Help
 - Links to our Help pages in a new browser tab
- Searchbox
 - Opens search results in a new browser tab
- Invite a Friend
 - Please do! ☺
- Feedback
 - Email us with any comments, questions, or problems
- Logout

Task Wizard (top left panel)

- Helps you accomplish the most common tasks in Stock Rover
- Test out each item in the Task Wizard on your own

Navigation Panel (lower right panel)

- Populates Table rows
- Portfolios, watchlists, and screeners are user-defined
- Indices, Sectors, and ETFs for browsing

The Table (center top panel)

- Table header orients you as to what rows are currently displayed
- Columns (metrics) are organized into Views
- Views are customizable
 - Add, remove, or sort by a column
 - Right-click on a column header or View tab and select 'Modify'
- Filtering
 - Filter on the columns in the current View
 - Filters stay on Table until removed by you
- Save Table
 - Save stocks in the Table as a watchlist or portfolio
 - Export the Table (Premium – not available for Premium Trial)
- Print
 - Copy and paste printable format into spreadsheet programs
- The Research Box
 - Search for tickers by company name or ticker symbol
 - Tickers in the Research Box are called “research tickers”
 - Research tickers stay in the Table until you remove them
 - View them with any dataset, or view only research tickers
 - Get a history of past research tickers
- See ticker history

Screening

- Run a screener by clicking on it in the Navigation panel
- Modify or create new screener
 - See how many stocks pass the screener as you build it up
- Add Quant features for ranking (Premium)

The Chart (center bottom panel)

- Links with Table
- Change time periods
- Zoom in on a chart
- Primary ticker (leftmost ticker) is special
 - Replaced by what is selected in Table (if linked)
 - Dependent benchmarks
 - Technicals apply only to primary ticker
 - Fundamental metric packages apply only to primary ticker
- Set a baseline
- Adjust price for dividends

- Add technicals, fundamentals, or change chart settings

The Insight Panel (right side of screen)

- Populated by the row that is selected in Table
- Summary tab
 - Market summary
 - Company summary
 - SEC filings, major holders, and insider transactions (bottom of panel)
- Detail tab
 - Analyst estimates and detailed financial data
 - Switch between quarterly and yearly data (Q/Y button)
- News tab
 - Stock-specific or market news
 - Right-click to view a story in another tab
 - Add news feeds from list
- Peers tab
 - Shows industry peers
 - Columns can be added, removed, and filtered
 - Info tooltips appear when you mouseover a ticker
- Links tab
 - Links to outside research sites
 - Modify the list and add your own
 - Cash symbol means the site requires a login
- Notes tab (**Premium**)
 - Create research notes while you work in Stock Rover
 - Notes are time-stamped and searchable

Investors' Library

- Import anything into your account for free
- Submit your own portfolios, screeners, etc.
- Custom Metrics, Metric Packages, and Quants are Premium only

Portfolio Reporting (**Premium**)

- Select which portfolios you want to analyze and over what time periods
- Metrics and graphs for determining performance, risk, and best/worst stock picks
- Can be opened in another window or printed

Additional Resources

- **Video Library** — www.stockrover.com/video.html
 - Short tutorials can help you review content from this webinar
 - Full recorded webinars will give you workflow ideas and Stock Rover tricks
 - *Tip:* almost every video page has a list of the video's contents (scroll down to see)
 - Follow us on YouTube or Twitter to learn when new videos come online
 - www.youtube.com/user/StockRover
 - www.twitter.com/stockrover
- **How To Guide** — www.stockrover.com/help-how-to.html
 - Step-by-step instructions for all Stock Rover features
- **Support** — www.stockrover.com/support-data.html
 - Browse past questions from our users
 - See a glossary of Stock Rover terms
- **Metrics & Tickers** — www.stockrover.com/metrics-profile.html
 - A list of all the metrics and tickers currently available in Stock Rover