

Stock Rover 101 — Webinar Outline

A Few Basics

- Left Side Panel
 - fully collapsible, or collapse individual menus
- Help Menu
 - upper right hand corner, along with search and your account information
 - Help, What's new, Contact Us
- 1. Start Menu - portfolio reporting, alerts, library
 - Customize with 37 different actions, some of which will bring up dialogue boxes to guide you
 - Search box allows you to search for any action in the start menu
 - Investor library now lives here as one of the start menu options (guru portfolios specifically)
 - Get specific with options in start menu (3 options)
- 2. Market Summary
 - Lists latest updates in “as of”
 - Links to Markets homepage if you click on hyperlinked “market summary”
- 3. Quotes Box
 - Contains research box - add list of tickers, portfolios, watchlists, indices, sectors, or industries
 - Can see different items prepared in a table
 - See price and daily change (% or \$)
 - Can include or not include clicker in table with checked box (uncheck individuals, or click “include all” to see or not see them in the table)
 - Use specific example to describe benefits
 - Ticker Tool Tip
 - Ticker tooltip has been expanded to include:
 - Company name, price, last close and open price, graphical metrics for the daily and 52 week trading range
 - Chart of days price
 - Profile metrics: sector, industry, market cap, employees, sales, average volume
 - Financials metrics: P/E, EPS, PEG Forward, EPS Next-Year, 17.4%, 0.7% dividend yield
 - Isolate quotes, adding quotes to watchlists
- 4. Navigation Panel
 - Populates Table rows
- Portfolios, watchlists, quotes, and screeners are user-defined under “My Stuff”

- Create or import your own
- Re-order the list by dragging-and-dropping
- Indices, Sectors, Commodities and ETFs for browsing under “Markets”
- Right-click any item in Navigation panel for menu of options

The Table (center top panel)

- “Portfolios” at top of table shows which portfolio you are currently viewing, and easy to jump between portfolios by clicking it and picking others
- Columns (metrics) are organized into Views
 - Jump to any view with the “views” drop down menu
- Views are customizable
 - Add, remove, or sort by a column
 - Right-click on a column header or View tab and select ‘Modify’
- Right-click any row, column header, or View tab for a menu of options
- See ticker history
 - 10 years/quarters data for Premium; 5 years/quarters for Basic
- Ticker info tooltips
- Filter, save, and print are all located in “actions: in table header”
 - Filters stay on Table until removed by you
- Save Table
 - Save stocks in the Table as a watchlist or portfolio
 - Export to CSV (Premium)
- Print
 - Copy and paste printable format into spreadsheet programs
- Add column
 - Search for column in box, tells you which views contain each of the returned metrics, jump straight to that view from the drop-down menu
- Target Buy Price and Target Sell Price
 - Include percent columns
 - Grouping
 - Comments

Screening

- Run a screener instantly by clicking on it in the Navigation panel
 - Screener brings up number of passing stocks
 - Go through menu of screener that was picked out
 - Manipulate by changing the metrics of the stock (shows how many are passing with new manipulation)
 - Checking boxes only shows you how many would be passing with or without that metric, doesn’t apply to table

- To have it apply to table, need to remove the screener by clicking the “X”
- Modify or create new screener by right-clicking
 - Save interesting population of stocks as watchlist

The Chart (center bottom panel)

- Links with Table
 - Link / unlink controls are now in the settings menu
 - Left side of chart’s toolbar controls the lines that are charted, the right side controls any additional charting settings
 - Type into box on left to add to the chart, or use the drop down arrow to find a history of recently charted tickers
- Change time periods
- Zoom in on a chart
- Primary ticker
 - Replaced by what is selected in Table (if linked)
 - Swap tickers to be primary tickers
 - Chart vs. Compare in chart
 - Dependent benchmarks
 - Technicals apply only to primary ticker
 - Fundamental metric packages apply only to primary ticker
 - add or remove comparison tickers by clicking the compare menu item, can choose to set these stocks as baseline
- Set a baseline
 - Click on the ticker in the chart to do this
- Adjust price for dividends
- Add technicals, fundamentals, or change chart settings
 - Bollinger bands
 - PE as fundamental, charts below ticker
- Shortcuts (Premium)
 - Save your favorite chart configurations to apply them easily

The Insight Panel (right side of screen)

- Populated by the row that is selected in Table
- Summary tab
 - Market summary
 - Home Page (company summary)
 - Ownership and officers (SEC filings, major holders, and insider transactions)
 - Filings (reports, other forms)

- Key performance details
- Portfolio allocation - if portfolio is loaded in the table, shows the allocation for stock that is selected in table
- Detail tab
 - Analyst estimates and detailed financial data
 - Switch between quarterly and yearly data (Q/Y button)
- News tab
 - Stock-specific or market news
 - Click on a story to view it
 - Add news feeds from list
- Peers tab
 - Option to load the stocks to the table
 - Filtering through column header now has option to filter within a percentage of the metrics value for the selected stock
 - selecting filter peers also brings up a box with all peers column in order to more quickly filter several columns
 - otherwise acts very similarly to the table
- Links tab
 - Links to outside research sites
 - customizable (can be bookmarks)
 - Modify the list and add your own

Notes:

- Add notes to attach to stocks selected in portfolio
- Detach notes panel in order
- Notes are time-stamped and searchable

Markets:

- Markets - access to earnings calendar, Forums, markets homepage and additional news
 - Great for daily visits to stay updated on stocks of interest.
 - Access through “Market Summary” hyperlink in Stock Rover, or click on “Markets” in homepage.

Stock Rover Mobile

- Tablet and phone apps – free and intuitive to use
- Just go to Stock Rover in the browser of your phone or tablet and click “mobile sign-in”
- iPad and iPhone users can download the native app through the Apple Store

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
- **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