

Stock Rover 101 — 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
 - Select which portfolios you want to analyze & over what time periods
 - Metrics and graphs for determining performance, risk, and best/worst stock picks
 - Correlation to help you see diversification risk
 - Can be opened in another window or printed
- Investors' Library
 - Import anything into your account for free
 - Submit your own portfolios, screeners, etc.
- Options
 - Includes a variety of Stock Rover settings, plus your account information
 - Turn on/off different kinds of tooltips
- Help
 - Links to how-to guide, video pages, and support
- Searchbox
 - Opens search results in a new browser tab
- Invite a Friend
 - Please do! 😊
- Alerts (Premium)
 - Get notified immediately when something interesting happens
- Feedback
 - Email us with any comments, questions, or problems
 - See our support policy: www.stockrover.com/support-policy.html
- Logout

Task Wizard (top left panel)

- Helps you accomplish the most common tasks in Stock Rover

Navigation Panel (lower left panel)

- Populates Table rows
- Portfolios, watchlists, and screeners are user-defined
 - Create or import your own
 - Re-order the list by dragging-and-dropping
- Indices, Sectors, and ETFs for browsing
- Right-click any item in Navigation panel for menu of options

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'
- 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
- 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
- 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 to CSV (Premium)
- Print
 - Copy and paste printable format into spreadsheet programs

Screening

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

- Screen on historical data & compare metrics to each other using freeform equations (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
- 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
 - Company summary
 - SEC filings, major holders, and insider transactions
 - Key performance details
- 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
 - 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

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