

Stock Rover's "Hidden" Features

The Table: Rows

- Expand row for metric history
 - Click the arrow button:  next to the ticker cell to open data from past years/quarters
- Multi-select in table – time saver!
 - Ctrl-click several rows to chart them all (when Table and Chart are linked)
 - Operate on multiple tickers at once via right-click menu
 - **Tip:** This is the fastest way to merge watchlists
 - Multi-select equities to buy them all equally in a portfolio
 - Multi-select portfolios to export them all at once
- Coloring rows
 - Color stays with stock even if you go to a different dataset
 - Click palette icon to get rid of a row's color
- Tagging rows ([Premium](#))
 - Add Tag column to see tags at all times (use 'Add Column' searchbox)
 - Manage tags by right-clicking a ticker or through the Tag column header
 - Group the table by tags or save tagged tickers together as watchlist or portfolio
- Grouping
 - Right-click any column header for the option to group the table
 - See how groups perform as a whole
 - Table stays grouped until un-grouped
 - See how a screener, watchlist, or portfolio breaks down by sector or industry
 - **Tip:** Use tags/colors to create your own grouping organization for the table
- Hide Row
 - Filters out tickers from view
 - Summary row updates accordingly
 - **Tip:** Use multiselect to hide multiple rows at once
- Task Wizard – Filter the Table
 - Create multiple filters from one window
 - Temporarily add a column to the view for the purpose of filtering
- Save filters as a screener
 - Apply a screener to the Table as a set of filters
- Finding a stock in a long list
 - Use Research Box
 - Ctrl+F (will work depending on what you are looking for)

The Table: Columns

- Return metrics
 - for all time periods
- Graphical metric tooltips

- Yearly Sales, EPS
 - different color bars to indicate positive/negative values, and estimated/actual
 - # analysts following, highs/lows
- Explain columns
- Rearrange view tabs
- Views can be exported/imported
- Views can be downloaded from library

The Table: Misc.

- Print the Table
 - can be copied and pasted
- Industry/Sector columns are hyperlinked
 - This can be a fast way to get to all stocks within a certain industry
- “Show All Stocks”
 - for portfolios, sectors, and ETFs
- Back/forward buttons to page through previous Table configurations
 - will include filters and research tickers
- See Research box history using drop-down arrow
 - also in Chart
- Waterfall arrow in research box to select only research tickers

Portfolios

- Select “My Portfolios” in Navigation
 - Portfolio Tooltips in Table
 - Portfolio allocation chart in Insight panel
 - Top 5 Movers in Insight panel
 - You can add columns and change timespan
 - Portfolio news in Insight panel
- Edit quantities/cost per share directly in Table (just click on the cell)
 - Enters trades for the current date
- Portfolio Activity event in Chart
- Chart all portfolios by right-clicking in Navigation panel
- Portfolio Reporting ([Premium](#))
 - Tooltips in Holdings tab
 - Tooltips in Correlation
- Modeling
 - Right-click a portfolio to open
 - Editing model quantities creates a model you can compare with your existing portfolio
 - You can group and order the table just as you can in the main Table
 - Change time periods to see analytics in right-side panel change

Screening

- Screen on industry, sector, exchange, or country

- Screen Current Table applies a screener as a set of filters to any dataset
 - You can even screen a screener
- Apply Quant to portfolio or watchlist ([Premium](#))

Chart

- “Chart All” sectors, portfolios etc.
- Bolded chart lines on mouseover
- Switch the primary ticker
- Shortcuts ([Premium](#))
- “More” menu for different time periods (e.g. Month to Date)
- Type name of screener or watchlist into the Chart’s research box
- Portfolios in Benchmarks menu
- Set as a Baseline button
- Adjust Price for Dividends shortcut
- Zoom in on the chart
- Check out each technical – our videos and recorded webinars can help!
- Metric Packages ([Premium](#))
- Candlesticks and Price Logarithmic in Settings Menu

Insight Panel

- Pop out Chart/Insight panel ([Premium](#))
 - Can also do this with Portfolio Reporting and Portfolio Modeling
 - Does not work in Internet Explorer
- Click on Grades links (text and grades)
 - Details
 - Peer context
- Reports & Ownership links
- Tooltips in Peers tab
- Filter peers
- Add a peer to the Research Box using the green plus button
- Change/add research links
 - **Tip:** Make this list your own! It can be a time-saver by bookmarking all the sites you like to view when researching stocks
- Keep research note open while using Stock Rover ([Premium](#))
- Notes automatically filter for selected stock ([Premium](#))
 - Can also filter by date
 - Clear searchbox to see all notes

Toolbar

- Library
 - Import screeners and watchlists featured in our webinars and blog posts
 - Defaults can be imported
- Tooltip settings

- Options >> Tooltips
- Auto Refresh Table ([Premium](#))
- Email notifications

Additional Resources

- Context-sensitive Help links throughout program (anytime you see a “?” box)
- Videos & Recorded webinars (www.stockrover.com/video.html)
- Support Pages (www.stockrover.com/support-data.html)
 - answers to real questions from users
- Metrics & Tickers (www.stockrover.com/metrics-profile.html)
 - all our metrics listed and defined (including custom metrics)
 - a list of all stocks and ETFs with their ticker symbols