

What's New in Stock Rover 4.4?

July 16th 2014

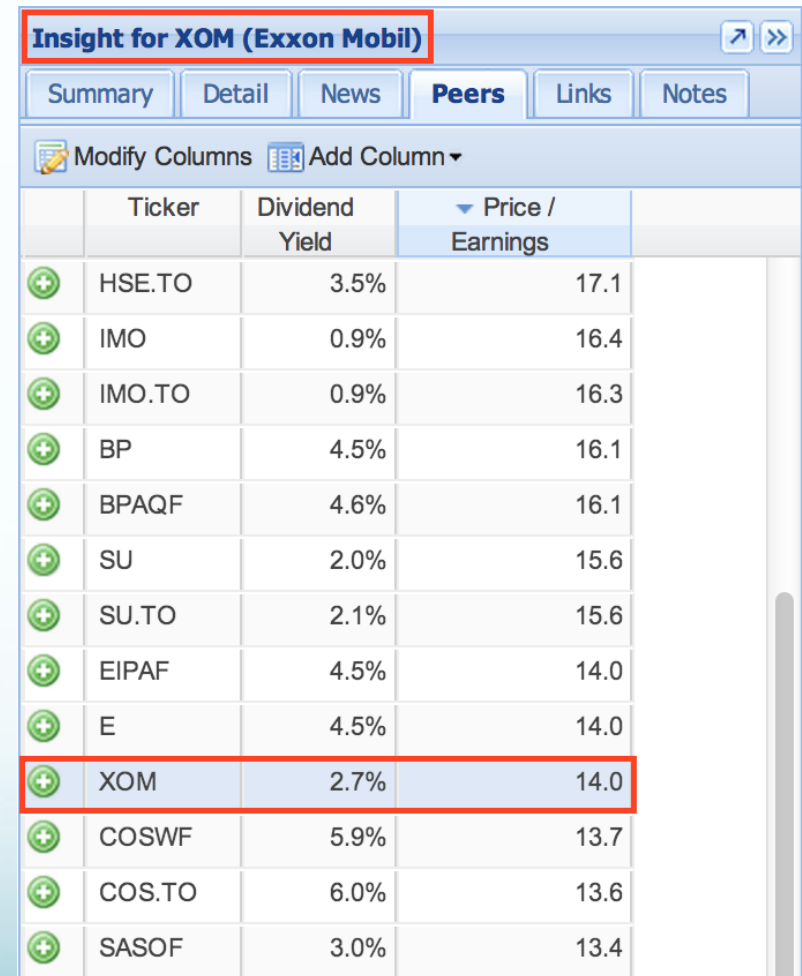
Presentation available at
www.stockrover.com/webinar-outline.html

Today's Agenda

- Updates to Insight Panel, Chart, and Portfolio Reporting
- New Metrics
- Redesigned Tablet App Demo
- Portfolio Modeling Facility Demo

Insight Panel – Peers Tab Updates

The ticker selected in the Peers tab will automatically be highlighted



	Ticker	Dividend Yield	Price / Earnings
+	HSE.TO	3.5%	17.1
+	IMO	0.9%	16.4
+	IMO.TO	0.9%	16.3
+	BP	4.5%	16.1
+	BPAQF	4.6%	16.1
+	SU	2.0%	15.6
+	SU.TO	2.1%	15.6
+	EIPAF	4.5%	14.0
+	E	4.5%	14.0
+	XOM	2.7%	14.0
+	COSWF	5.9%	13.7
+	COS.TO	6.0%	13.6
+	SASOF	3.0%	13.4

Insight Panel – Notes Tab Updated

- Notes tab will automatically search on the selected ticker
- Clear the search to see all the notes

The screenshot displays the 'Insight for ABT (Abbott Laboratories)' interface. The 'Notes' tab is selected, and the search bar contains 'Abbott Laboratories'. The search results show a note titled 'Abbott Laboratories Given ?Market Perform? Rating at Sanford C. Bernstein (ABT)' dated Jan 2, 2014 2:30 pm. The note content includes a URL: <http://www.dailypolitical.com/finance/stock-market/abbott-laboratories-given-market-perform-rating-at-sanford-c-bernstein-abt.htm>.

Note	Date
Abbott Laboratories (ABT) Jan 2, 2014 2:30 pm Abbott Laboratories Given ?Market Perform? Rating at Sanford C. Bernstein (ABT) http://www.dailypolitical.com/finance/stock-market/abbott-laboratories-given-market-perform-rating-at-sanford-c-bernstein-abt.htm	

Insight Panel – Detail Tab Updates

- Income Summary now shows Other Income and Expenses and Selling General and Administration

Insight for ABT (Abbott Laboratories)										
Summary Detail News Peers Links Notes										
Analyst Estimates										
Growth										
Income Summary Full Statement										
Q Y	TTM	2013	2012	2011	2010	2009	2008	2007	2006	2005
Income Summary										
Sales	21,714	21,849	21,494	38,854	35,179	30,775	29,528	25,920	21,703	21,945
Cost of Sales	10,078	10,041	9,817	15,542	14,669	13,213	12,612	11,425	9,349	10,455
EBITDA	4,241	4,398	3,345	8,777	8,893	9,802	8,224	6,921	5,797	5,981
Other Income and Expenses	12	-18	-1,300	-107	74	-1,426	490	348	553	351
Income Before Tax	2,389	2,521	305	5,204	5,714	7,192	5,856	4,473	3,897	4,370
Income After Tax	2,177	2,383	579	4,731	4,628	5,746	4,734	3,609	3,153	3,370
Net Income	2,406	2,576	5,963	4,731	4,628	5,746	4,881	3,609	3,169	3,370
Net Income Common Stockholders	2,406	2,576	5,963	4,731	4,628	5,746	4,881	3,609	3,169	3,370
Sales Per Employee	\$276,804	\$259,967	\$236,198	\$430,448	\$456,038	\$439,021	\$432,534	\$386,687	\$363,316	\$362,127
Shares	1,548	1,567	1,595	1,577	1,556	1,560	1,551	1,563	1,542	1,564
Foreign Sales (%)	71	71	58	59	57	53	51	49	-	-
Operating Expenses										
Research	1,493	1,452	1,545	4,130	3,727	2,915	2,689	2,506	2,596	1,795
Interest Expense	155	157	258	530	553	520	528	593	415	251
Selling General And Administration	6,912	6,936	7,443	12,753	10,381	8,406	8,436	7,409	5,968	5,431
USD in Millions except per share data										

Insight Panel - New News Feed

- News feed now aggregates across all selected sources
- Collapsible sections for stock-specific news and market news

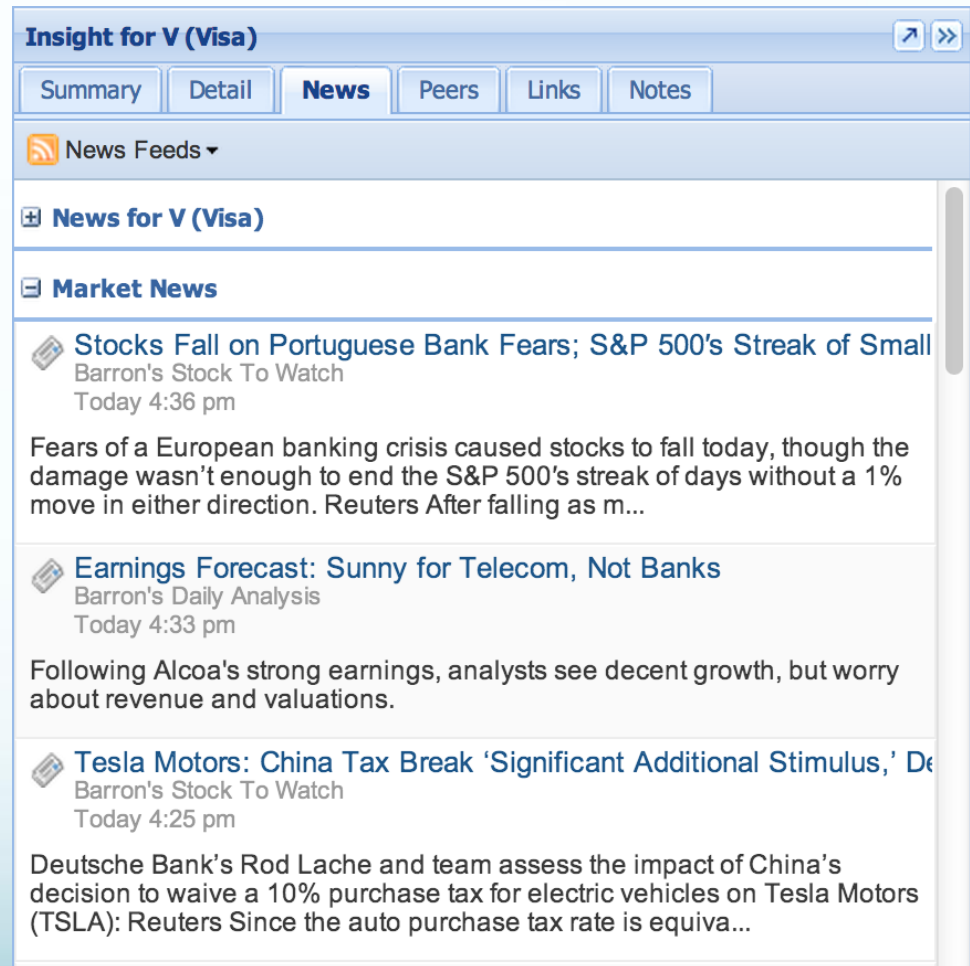
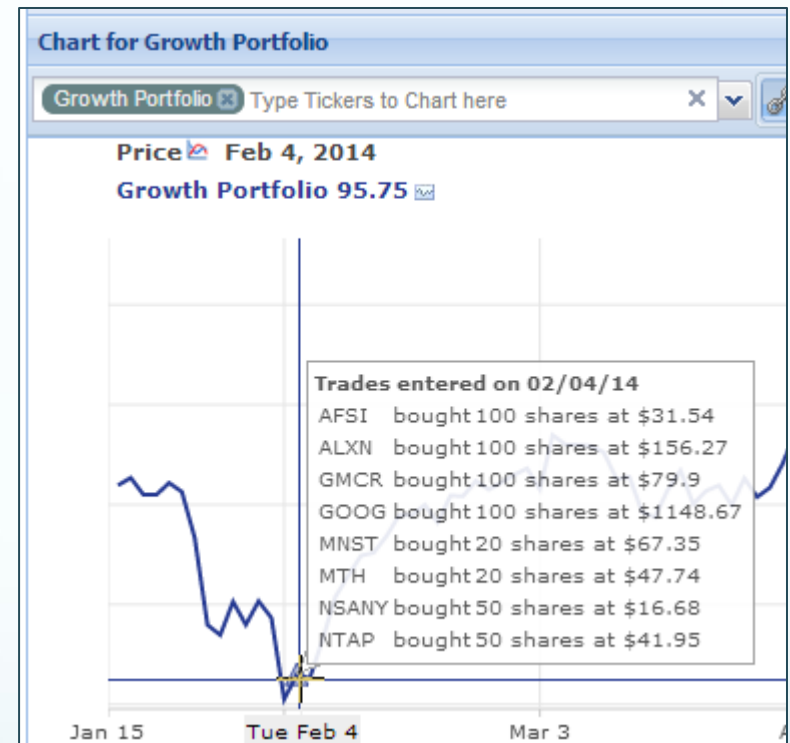


Chart – Portfolio Activity Tooltips

- The Portfolio Activity tooltip will show a list of the trades on a mouseover



Portfolio Reporting

- The Value Over Time tab now contains an average cash column
- The Holdings tab metrics Total Return and Percent of Total Return are now graphical

Value Over Time Risk And Reward Holdings Detail Correlation Print Export									
Ticker	Start Value	Average Value	End Value	Percent of Total Value	Gain (\$)	Gain (%)	Total Return (%)		Percent of Total Return
AFSI	\$0	\$442	\$4,134	34.4%	\$304	64.7%	76.6%		2.4%
BLK	\$1,727	\$2,030	\$3,248	27.0%	\$1,520	100.8%	114.6%		16.2%
CASH\$	\$0	-\$407	-\$2,303	-19.2%	\$0	0.0%			
CVS	\$627	\$998	\$2,324	19.3%	\$1,087	156.8%	164.1%		11.4%
DK	\$0	\$32	\$0	0.0%	-\$80	-180.6%	-148.9%		-0.3%
FDO	\$460	\$776	\$929	7.7%	\$469	112.3%	118.3%		6.4%
JJSF	\$0	\$303	\$1,397	11.6%	\$252	94.3%	98.0%		2.1%
JST	\$0	\$32	\$130	1.1%	\$25	100.9%	108.4%		0.2%
NUS	\$156	\$471	\$700	5.8%	\$545	388.5%	392.1%		12.8%
THI	\$254	\$378	\$0	0.0%	\$319	158.1%	169.5%		4.4%
TNC	\$325	\$825	\$1,448	12.0%	\$1,123	374.8%	384.9%		22.1%
UTMD	\$428	\$410	\$242	2.0%	\$317	99.7%	118.3%		3.4%
VFC	-\$284	-\$662	-\$1,252	-10.4%	-\$968	380.5%	-396.6%		18.2%
XOM	\$0	\$189	\$1,024	8.5%	\$91	49.9%	63.7%		0.8%
Summary	\$3,693	\$5,817	\$12,021	100.0%	\$5,005	180.8%	270.6%		100.0%

Portfolio Reporting - Correlation

- Correlation tab automatically will show the selected portfolio or watchlist as a row and column

Value Over Time Risk And Reward Holdings Detail Correlation												
Type Tickers to Add here												Filter
Ticker	AFSI	BLK	CVS	Dividend	FDO	JJSF	JST	NUS	TNC	UTMD	VFC	XOM
AFSI	1	0.83	0.95	0.97	0.83	0.96	-0.71	0.85	0.94	0.93	0.97	0.92
BLK	0.83	1	0.91	0.93	0.48	0.90	-0.33	0.80	0.84	0.92	0.84	0.78
CVS	0.95	0.91	1	0.97	0.71	0.98	-0.58	0.84	0.93	0.94	0.97	0.90
Divide...	0.97	0.93	0.97	1	0.76	0.98	-0.60	0.89	0.95	0.96	0.96	0.91
FDO	0.83	0.48	0.71	0.76	1	0.98	-0.52	0.72	0.78	0.70	0.81	0.83
JJSF	0.96	0.90	0.98	0.98	0.98	1	-0.61	0.85	0.94	0.96	0.97	0.89
JST	-0.71	-0.33	-0.58	-0.60	-0.52	-0.61	1	-0.52	-0.64	-0.57	-0.68	-0.72
NUS	0.85	0.80	0.84	0.89	0.72	0.85	-0.52	1	0.88	0.86	0.88	0.77
TNC	0.94	0.84	0.93	0.95	0.78	0.94	-0.64	0.88	1	0.90	0.95	0.88
UTMD	0.93	0.92	0.94	0.96	0.70	0.96	-0.57	0.86	0.90	1	0.92	0.83
VFC	0.97	0.84	0.97	0.96	0.81	0.97	-0.68	0.88	0.95	0.92	1	0.93
XOM	0.92	0.78	0.90	0.91	0.83	0.89	-0.72	0.77	0.88	0.83	0.93	1

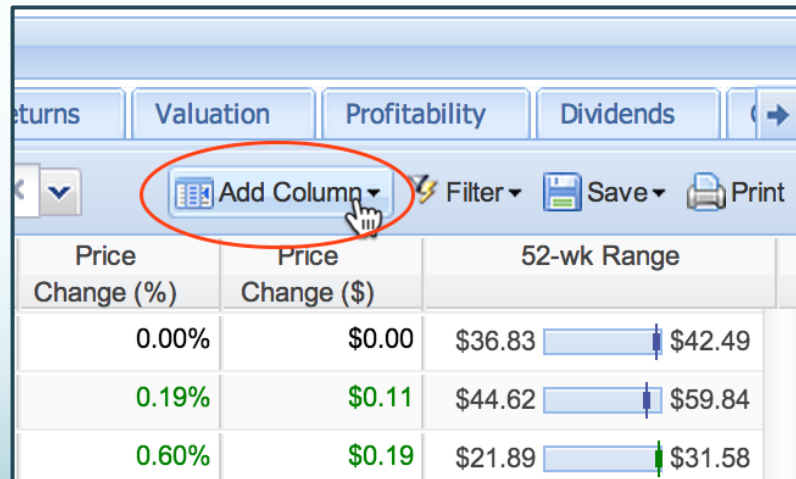
Dividend Portfolio

Most correlated: **JJSF** 0.98

Least correlated: **JST** -0.60

New Metrics

- For all users:
 - Selling General and Administration
 - Other Income Expenses
- For Premium Users:
 - 10-Year Return
 - 10-Year Return vs. Sector
 - 10-Year Return vs. Industry
 - 10-Year Return vs. S&P 500



The screenshot shows a financial software interface with a table of data. The table has three main columns: Price Change (%), Price Change (\$), and 52-wk Range. The 'Add Column' button is circled in red. The table contains three rows of data.

Price Change (%)	Price Change (\$)	52-wk Range
0.00%	\$0.00	\$36.83 - \$42.49
0.19%	\$0.11	\$44.62 - \$59.84
0.60%	\$0.19	\$21.89 - \$31.58

New Custom Metrics

(Premium)

- New custom metrics added:
 - Annualized 10-Year Return
 - Annualized 10-Year Return vs. S&P 500
 - SMA 120
 - EMA 120
 - SMA 120 Adjusted
 - EMA 120 Adjusted
 - 120-day Avg. Price
 - 120-day Averaged Adjusted Price
 - Price vs. 120-day Avg. (%)
- Add these through the Investor Library

Tablet App

- Access by going to the website through your tablet's browser
- Or by downloading the app from the Apple store

Now, to the product!