

What's New in Stock Rover 5.0

Mobile Phone App

- Login to Stock Rover from your phone's browser using www.stockrover.com/sr/Phone
- Built for browsing, checking in, finding news, and conducting moderately detailed research
- The home screen displays different a list datasets to explore
- You cannot make modifications to your datasets in the phone app—what you do in the phone app has no bearing on the main app
- Open portfolios, watchlists, etc. to explore how they work
- You can see data for a dataset as a whole, or drill down into the individual tickers within
 - Try this out by swiping to the left when you have a portfolio open, then go back to the list of portfolio tickers, click on one, and swipe left
- Portfolios
 - See holdings and quantities, buy, price, and value, chart, and news
- Tickers
 - See summary data, details, chart, news, and a company overview
- Charting
 - Change periods using the bottom button
 - Tap the '+' button for all other settings options, including adding a ticker or benchmark, adding technicals, or setting something as a baseline
 - Only one comparison ticker/benchmark/technical can be charted at once
- News
 - Select a news feed from the menu at the top
 - Tap on any news story of interest, it will open in another tab
- Just looking for a quick stock quote? Tap the search button in the top bar (visible in every screen)
- Tickers you've recently searched for get saved in the "Recent Quotes" list—you can delete tickers from this list by tapping "Edit"
- The button with 3 bars is where you can see your account info, get help, send feedback, or logout
- Tapping the back button [<] takes you one level up in the navigation hierarchy (for example, if you are looking at a ticker in your watchlist, it will bring you to the My Watchlists screen; if you are looking at a ticker you've searched for, it will bring you to the Recent Quotes screen)

Freeform Screener Equations (Premium – will soon be available to Basic users for a limited time)

- Construct the screener of your dreams using freeform equations
 - Compare a metric to another metric
 - Compare a metric to itself in a past period
 - Practically any operation is fair game
 - You can create up an and/or condition

- Browse or search for a metric, or just begin typing it in the Equation box
- A calendar icon indicates that you can screen on historical data for that metric
- Let's try a few examples
 - "Share Buyback":
 - Seeking companies that have reduced their number of shares in the past year. This increases shareholder value and often indicates that a company is investing in itself. The share reduction must coincide with sales and earnings growth.
 - $\text{Shares [Now]} < \text{Shares [Y1]}$
 - $\text{Sales 1-Year Chg} > 5$
 - $\text{Sales 3-Year Avg} > \text{Sales 1-Year Chg}$
 - $\text{Sales 5-Year Avg} > \text{Sales 3-Year Avg}$
 - $\text{EPS 1-Year Chg} > 10$
 - "EPS & Sales Growth":
 - Seeking stocks with at least a 10% expected increase in EPS next year, at least a 7% increase in EPS over the last year, and at least a 5% increase in sales from last year. This indicates growth and potentially increased efficiency (earnings growing faster than sales).
 - $\text{EPS Next Year (Est.)} > (\text{EPS} * 1.1)$
 - Estimated EPS growth of at least 10%
 - $\text{EPS [Now]} > (\text{EPS [Y1]} * 1.07)$
 - EPS has increased 7% over last year
 - $\text{Sales [Now]} > (\text{Sales [Y1]} * 1.05)$
 - Estimated sales growth of at least 5%
 - "Price Momentum & Sector Outperformance"
 - Seeking momentum stocks that are outperforming their sectors (which are outperforming the S&P 500)
 - $\text{EMA 20} > \text{EMA 50}$ and $\text{EMA 50} > \text{EMA 200}$
 - 1 month return vs sector > 0
 - 6 month return vs sector > 1 month return vs sector
 - 1 year return vs S&P 500 > 1 year return vs sector
 - Quant weight: 100% Low MFI

Alerts (soon to be released for Premium users)

- Sign up to test them at support@stockrover.com (Basic users are welcome to test!)
- Select Alerts in top righthand corner of the toolbar or right-click a stock in the Table for which you want to set an alert
- Set an alert to trigger when a certain stock crosses a certain threshold
- Can be sent to phone or email or both
- Can view alerts history

- If you set an alert on an entire portfolio or watchlist, the trigger point applies individually to all stocks/ETFs in that portfolio or watchlist (depending on the dataset and alert settings, you could get a lot of alerts)

And a few more things...

- Target price is now global (previously could only use for portfolio stocks)
- Importing to update a portfolio now simpler
 - Can do so from the 'Modify Portfolio' window or by right-clicking the portfolio you wish to update and selecting "Import"
 - To import a new portfolio, select "Import" in the right-click menu from 'My Portfolios' or a portfolio folder
- Right-click a portfolio folder and select "Create" to have the new portfolio automatically add to that folder (previously, new portfolios would just get added to the default folder)
- Help menu includes links to how-to guides, videos, and support pages