# Roving for Stocks

**A Presentation to the Boston Investors’ Group**

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## Presentation Goals

1. Demo Stock Rover features to help you find and pare down a list of stocks.
2. Focus on initial research, point out options for drilling down further

## Market Context

1. Stock Rover Markets
2. Stock Rover Weekly Brief
3. Chart sectors vs. S&P 500 over 1, month, 3 months, 1 year

## Screening

1. Basic screening – simple filters, e.g...

ROA > 5%

1. Equation screening – metric comparison or more complex filters, e.g...

ROA [now] >= ROA [1 year ago]

Sales [now] >= 2\*Sales [2 years ago]

1. Ranked screening – weighting criteria for a score and rank, e.g....

30% on profitability metrics such as ROA, 30% on growth metrics such as sales change, 40% on valuation metrics such as P/E

*Example using all three methods:*



## Paring Down the List

**In the Table:**

1. Save as a watchlist
2. Apply screener ranking to watchlist
3. Group by sector
4. Compare in views
5. Open historical data to look for trends in the data

*Other actions:* Export for offline number-crunching, add column or create a custom view, filter, sort

**In the Chart:**

1. Link to Table and run through charts vs. industry, sector, and S&P500
2. Set ticker as a baseline for relative performance
3. Chart a subset from the watchlist together to compare performance

*Other chart options:* add events such as max drawdown and splits, use technicals to assess momentum, chart fundamentals for a visual story on financials, shortcuts for instant chart configuration, candlesticks, dividend-adjusted price

**In the Insight Panel:**

1. Summary – what is this company?
2. Homepage – the company’s front door
3. Grades – a quick take on profitability, growth, and financial health according to Morningstar’s strict criteria
4. Short interest – is it in a normal range?
5. Sales & EPS, growth – is the company growing earnings?
6. Analyst ratings and estimates – how do analysts feel about it? are estimates being revised up or down?
7. News – any significant headlines?
8. Peers – where does the company fall compared to its peers in valuation, market cap, returns, and any other metric you want to see?

*Other Insight Panel resources:* company filings, earnings transcripts, outside links, statements, customize Peers tab, load peers in the main table

**Other Tools:**

1. Research tickers (Quotes Box) – add in a ticker for comparison to the current list
2. Alerts – set alerts on individual stocks or whole watchlists/portfolios
3. Comments, notes, tags, and coloring for annotation and cataloguing
4. Correlation (last tab of Portfolio Analysis) – see how a new pick correlates with your current portfolio
5. Library – import sample screeners and more, share your own watchlists and screeners