

# Getting Started in StockRover

**Stock Rover is a powerful platform for finding, comparing, and tracking stocks, ETFs, and funds.** It streamlines the stock research process in a highly interactive and customizable user interface (UI). Although Stock Rover is accessible through your Internet browser, its web 2.0 technology allows it to feel and act more like an installed application, where you can right-click, drag-and-drop, resize panels, and more.

Read on for a quick introduction to the Stock Rover paradigm. Once you get familiar with the layout and learn a few simple tricks, you'll be well on your way to smarter investing!

Like to learn by doing? After familiarizing yourself with the screen layout on the next page, head to page 14 for a list of simple tasks to test and expand your working knowledge of Stock Rover.



# THE STOCK ROVER USER INTERFACE

**Start Menu**

**Market Summary**

Index	Value	Change	% Change
DJIA	17,404.85	-210.32	-1.19%
S&P 500	2,084.23	-19.95	-0.95%
S&P 100	918.17	-9.30	-1.00%
Nasdaq 100	4,529.73	-43.38	-0.95%

**Quotes Box**

Ticker	Price	Change	% Change
AAL	\$43.17	\$1.49	3.57%
ALK	\$79.86	\$1.23	1.56%

**Navigation Panel**

- Markets
  - Indices
    - DJIA
    - S&P 100
    - S&P 500
    - Nasdaq 100
  - Sectors
  - ETFs
  - My Stuff
    - Quotes
    - Portfolios
    - Watchlists
    - Screeners

**The Table**

Ticker	Company	Last Close	Price	Daily Price Range	Price Change (\$)	Price Change (%)
AAL	American Airlines Group	\$41.68	\$43.17	\$41.65 - \$43.42	\$1.49	3.57%
AAP	Advance Auto Parts	\$173.66	\$171.99	\$171.56 - \$173.73	-\$1.67	-0.96%
AAPL	Apple	\$119.72	\$116.32	\$116.12 - \$118.18	-\$3.40	-2.84%
ABBV	AbbVie	\$69.21	\$68.66	\$68.50 - \$69.29	-\$0.55	-0.79%
ABC	AmerisourceBergen	\$104.65	\$104.08	\$104.04 - \$105.00	-\$0.57	-0.54%
ABT	Abbott Laboratories	\$50.66	\$50.17	\$50.14 - \$50.52	-\$0.49	-0.97%
ACE	ACE	\$110.11	\$110.04	\$109.20 - \$110.54	-\$0.07	-0.06%
ACN	Accenture	\$105.20	\$104.28	\$104.23 - \$104.95	-\$0.92	-0.87%
ADBE	Adobe Systems	\$83.62	\$84.19	\$83.05 - \$84.86	\$0.57	0.68%
ADI	Analog Devices	\$61.09	\$60.02	\$59.75 - \$60.85	-\$1.07	-1.75%
ADM	Archer-Daniels Midland	\$46.53	\$45.74	\$45.74 - \$46.26	-\$0.79	-1.70%
ADP						

**The Chart**

Price Change Aug 11, 2015  
 AAL 43.15 (-12.0%) CPB 50.28 (+9.7%) UNH 122.57 (+6.0%)

Chart for AAL (American Airlines Group) showing price change from May 11, 2015 to August 11, 2015. The chart displays three lines: AAL (blue), CPB (orange), and UNH (green). AAL shows a significant decline from approximately \$45 to \$43.15, while CPB and UNH show upward trends.

**Account Settings and Help**

**Insight Panel**

**AAL American Airlines Group**

Price as of Tue 11:10am \$43.17 +1.49 (3.53%)

Cap \$29,336M  
 Short % of Float 3.9%  
 Employees 115,588  
 Industry Airlines  
 Sector Industrials  
 Ex-Dividend Date 08/06/15  
 Last Reported Quarter 06/30/15  
 Next Report Date 10/22/15

Growth Grade **D**  
 Profitability Grade **N/A**  
 Financial Health Grade **C**

Address 4333 Amon Carter Boulevard, Fort Worth, TX, USA, 76155  
 Home Page [AAL](#)

American Airlines Group Inc, formerly known as AMR Corp was incorporated in October 1982 and operates in the airline industry.

The Company is a holding company engaged in operation of a network air carrier through its subsidiaries American Airlines, Inc. (American), US

Ownership and Officers  
[Major Holders](#) [Insider Transactions](#) [Officers](#)

Filings  
[Annual Reports](#) [Quarterly Reports](#) [Other Forms](#)

Performance

	Stock	Industry	S&P 500
5-Day Return	1.2%	0.3%	-0.4%
1-Month Return	9.0%	5.4%	1.6%
1-Year Return	17.1%	19.9%	10.0%
3-Year Return	-	110.3%	58.0%
5-Year Return	-	10.5%	106.0%

Valuation

	Stock	Industry	S&P 500
Price / Earnings	9.4	22.6	21.2
Price / Book	10.6	3.4	2.9
Price / Sales	0.7	0.7	1.8





**The Start Menu** is a customizable list of all tasks in Stock Rover. This is a great place to go to initiate all kinds of actions, from setting up stock alerts to creating a screener.

**The Market Summary** is a quick table showing the market's current gains/losses.

**The Quotes Box** is a running list of quotes with current gain/loss information. You can also add portfolios and watchlists (just search for them by name in the Add Ticker box). Tickers in the quotes box can also be viewed in the Table for deeper research and comparison.

**The Navigation Panel** controls the dataset you are viewing in the Table. You can select parent and child items—for example, select “Portfolios” to see whole portfolios compared or select a particular portfolio to see its holdings.

**The Table** is a flexible, interactive spreadsheet. Columns containing financial metrics (over 275 to choose from!) are organized into “views,” which are accessible as tabs at the top of the Table.

**The Chart** allows you to visually explore price performance and directly compare different items, such as a ticker, index, portfolio, or screener. Plus it's loaded with technicals, fundamentals, and other options to help you analyze investments.

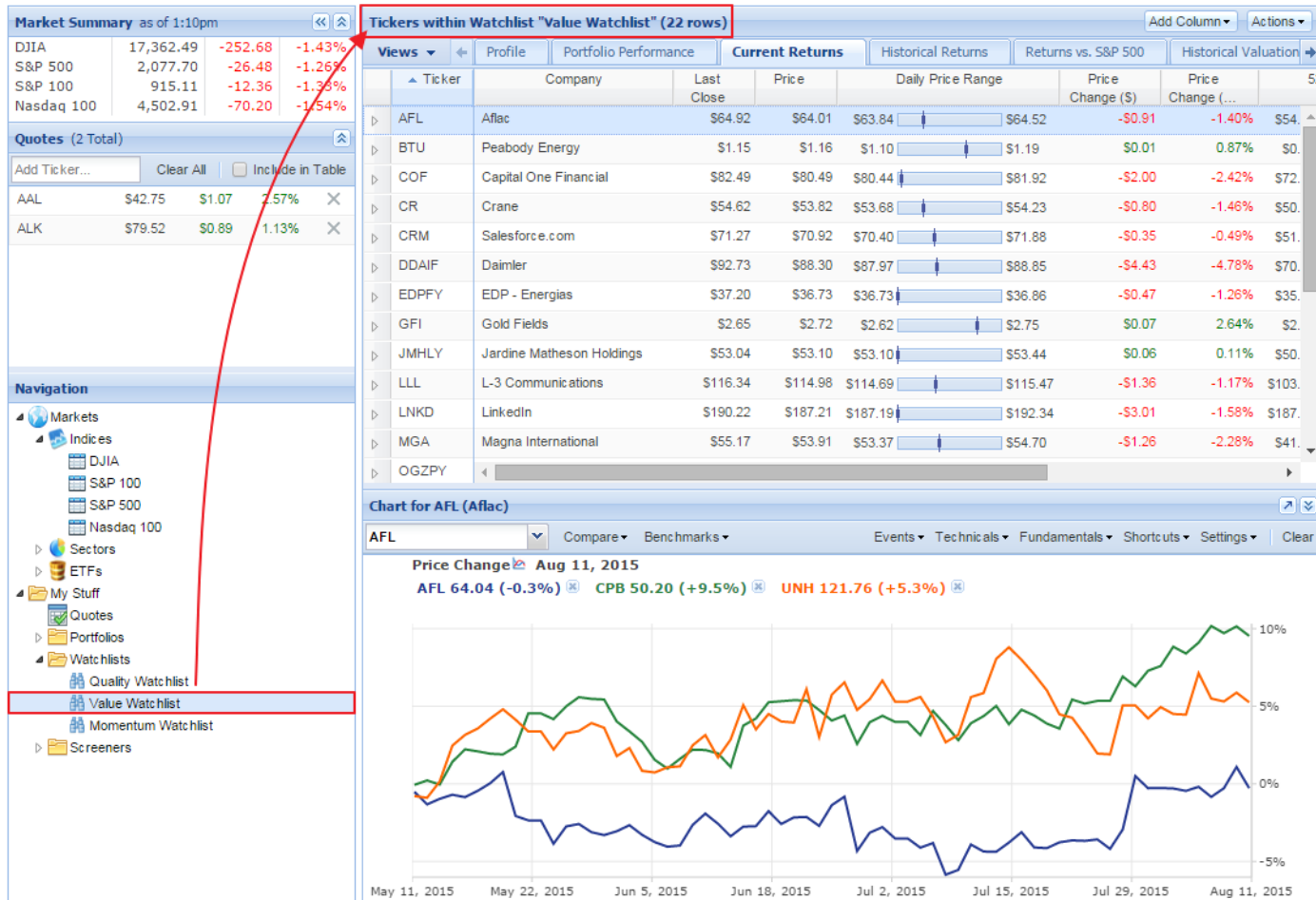
**The Insight Panel** is a multi-functional panel offering a wide variety of information and tools. The row selected in the Table controls what you see here.

**Account Settings and Help** menus let you set account preferences, change your membership plan, contact our support team, or link to the copious help resources on our website.



## BASICS OF NAVIGATION

The row selected in the **Navigation** panel populates the **Table** rows:



So, for example, if you wanted to **run a screener**, you could simply select its row in the Navigation panel to see its results load in the Table.



## BASICS OF NAVIGATION

In the **Quotes Box**, if you have “**Include in Table**” checked, these tickers will appear as rows in the Table alongside whatever dataset you have selected from the Navigation panel:

The screenshot displays a financial software interface with three main panels:

- Market Summary** (as of 1:15pm):

DJIA	17,363.46	-251.71	-1.43%
S&P 500	2,077.71	-26.47	-1.26%
S&P 100	915.15	-12.32	-1.33%
Nasdaq 100	4,503.62	-69.49	-1.52%
- Quotes (2 Total)**:

Add Ticker...	Clear All	<input checked="" type="checkbox"/> Include in Table		
AAL	\$42.82	\$1.14	2.74%	X
ALK	\$79.40	\$0.77	0.98%	X
- Tickers within Watchlist "Value Watchlist" (24 rows)**:

Views	Profile	Portfolio Performance	Current Returns	Historical Returns	Returns vs. S&P 500	Historical Valuation	
Ticker	Company	Last Close	Price	Daily Price Range	Price Change (\$)	Price Change (%)	
AAL	American Airlines Group	\$41.68	\$42.82	\$41.65 - \$43.42	\$1.14	2.74%	\$28.00
AFL	Aflac	\$64.92	\$64.05	\$63.84 - \$64.52	-\$0.87	-1.34%	\$54.00
ALK	Alaska Air Group	\$78.63	\$79.40	\$78.17 - \$80.28	\$0.77	0.98%	\$40.00
BTU	Peabody Energy	\$1.15	\$1.16	\$1.10 - \$1.19	\$0.01	0.87%	\$0.00
COF	Capital One Financial	\$82.49	\$80.55	\$80.44 - \$81.92	-\$1.94	-2.35%	\$72.00
CR	Crane	\$54.62	\$53.74	\$53.68 - \$54.23	-\$0.88	-1.61%	\$50.00
CRM	Salesforce.com	\$71.27	\$71.03	\$70.40 - \$71.88	-\$0.24	-0.34%	\$51.00
DDAIF	Daimler	\$92.73	\$88.30	\$87.97 - \$88.85	-\$4.43	-4.78%	\$70.00
EDPFY	EDP - Energias	\$37.20	\$36.73	\$36.73 - \$36.86	-\$0.47	-1.26%	\$35.00
GFI	Gold Fields	\$2.65	\$2.71	\$2.62 - \$2.75	\$0.06	2.26%	\$2.00
JMHL	Jardine Matheson Holdings	\$53.04	\$53.10	\$53.10 - \$53.44	\$0.06	0.11%	\$50.00
LLL	L-3 Communications	\$116.34	\$115.08	\$114.69 - \$115.47	-\$1.26	-1.08%	\$103.00
LNKD							

This makes it easy to quickly add in tickers, portfolios, or watchlists for comparison against other populations of stocks. Simply de-select “Include in Table” to remove the rows from the Table without deleting quotes from the Quotes Box.



## BASICS OF NAVIGATION

If you want to **see only quotes** in the Table, select the row “Quotes” from the Navigation panel. When viewed in the Table, quotes are called **research tickers**:

The screenshot displays a financial data interface with several panels:

- Market Summary** (as of 1:26pm):

DJIA	17,367.70	-247.47	-1.40%
S&P 500	2,078.20	-25.98	-1.23%
S&P 100	915.30	-12.17	-1.31%
Nasdaq 100	4,501.42	-71.69	-1.57%
- Quotes (2 Total)**:

AAL	\$42.81	\$1.13	2.71%	X
ALK	\$79.36	\$0.73	0.93%	X
- Navigation**: A tree view with categories: Markets, Indices (DJIA, S&P 100, S&P 500, Nasdaq 100), Sectors, ETFs, My Stuff (Quotes, Portfolios, Watchlists, Screeners). The "Quotes" item is highlighted with a red box.
- Research Tickers (2 rows)**: A table with columns: Ticker, Company, Last Close, Price, Daily Price Range, Price Change (\$), Price Change (%), and Price. It lists AAL (American Airlines Group) and ALK (Alaska Air Group). A red box highlights the "Research Tickers (2 rows)" header, and a red arrow points from the "Quotes" table to the "Summary" row in this table.
- Chart for AAL (American Airlines Group)**: A line chart showing price change from May 11, 2015, to August 11, 2015. The chart includes AAL (blue line), CPB (orange line), and UNH (green line). The AAL line shows a significant drop in early May followed by a recovery. The chart also includes a "Price Change" section for Aug 11, 2015: AAL 42.81 (-12.7%), CPB 50.16 (+9.4%), UNH 121.63 (+5.1%).



## BASICS OF NAVIGATION

The row selected in the **Table** populates the **Insight** panel:

**Research Tickers (2 rows)**

Ticker	Company	Last Close	Price	Daily Price Range		Price Change (\$)	Price Change (%)	52-Week High
AAL	American Airlines Group	\$41.68	\$42.81	\$41.65	\$43.42	\$1.13	2.71%	\$28.10
ALK	Alaska Air Group	\$78.63	\$79.36	\$78.17	\$80.28	\$0.73	0.93%	\$40.69

Summary: 1.82%

**Insight for AAL (American Airlines Group)**

**Summary** | Details | News | Peers | Links | Notes

**AAL American Airlines Group**

Price as of Tue 1:25pm: \$42.81 +1.13 (2.71%)

Cap: \$29,105M

Short % of Float: 3.9%

Employees: 115,588

Industry: Airlines

Sector: Industrials

Ex-Dividend Date: 08/06/15

Last Reported Quarter: 06/30/15

Next Report Date: 10/22/15

Growth Grade: **D**

Profitability Grade: **N/A**

Financial Health Grade: **C**

Address: 4333 Amon Carter Boulevard, Fort Worth, TX, USA, 76155

Home Page: [AAL](#)

American Airlines Group Inc, formerly known as AMR Corp was incorporated in October 1982 and operates in the airline industry.

The Company is a holding company engaged in operation of a network air carrier through its subsidiaries American Airlines, Inc. (American), US

**Ownership and Officers**

Major Holders | Insider Transactions | Officers

**Filings**

Annual Reports | Quarterly Reports | Other Forms

**Performance**

	Stock	Industry	S&P 500
5-Day Return	0.4%	0.0%	-0.8%
1-Month Return	8.2%	5.0%	1.2%
1-Year Return	16.2%	19.5%	9.6%
3-Year Return	-	109.6%	57.4%
5-Year Return	-	10.1%	105.2%

**Valuation**

	Stock	Industry	S&P 500
Price / Earnings	9.4	22.5	21.2
Price / Book	10.5	3.4	2.9
Price / Sales	0.7	0.6	1.8

**Chart for AAL (American Airlines Group)**

AAL | Compare | Benchmarks | Events | Technicals | Fundamentals | Shortcuts | Settings | Clear

Price Change Aug 11, 2015  
**AAL 42.81 (-12.7%)** | CPB 50.16 (+9.4%) | UNH 121.63 (+5.1%)

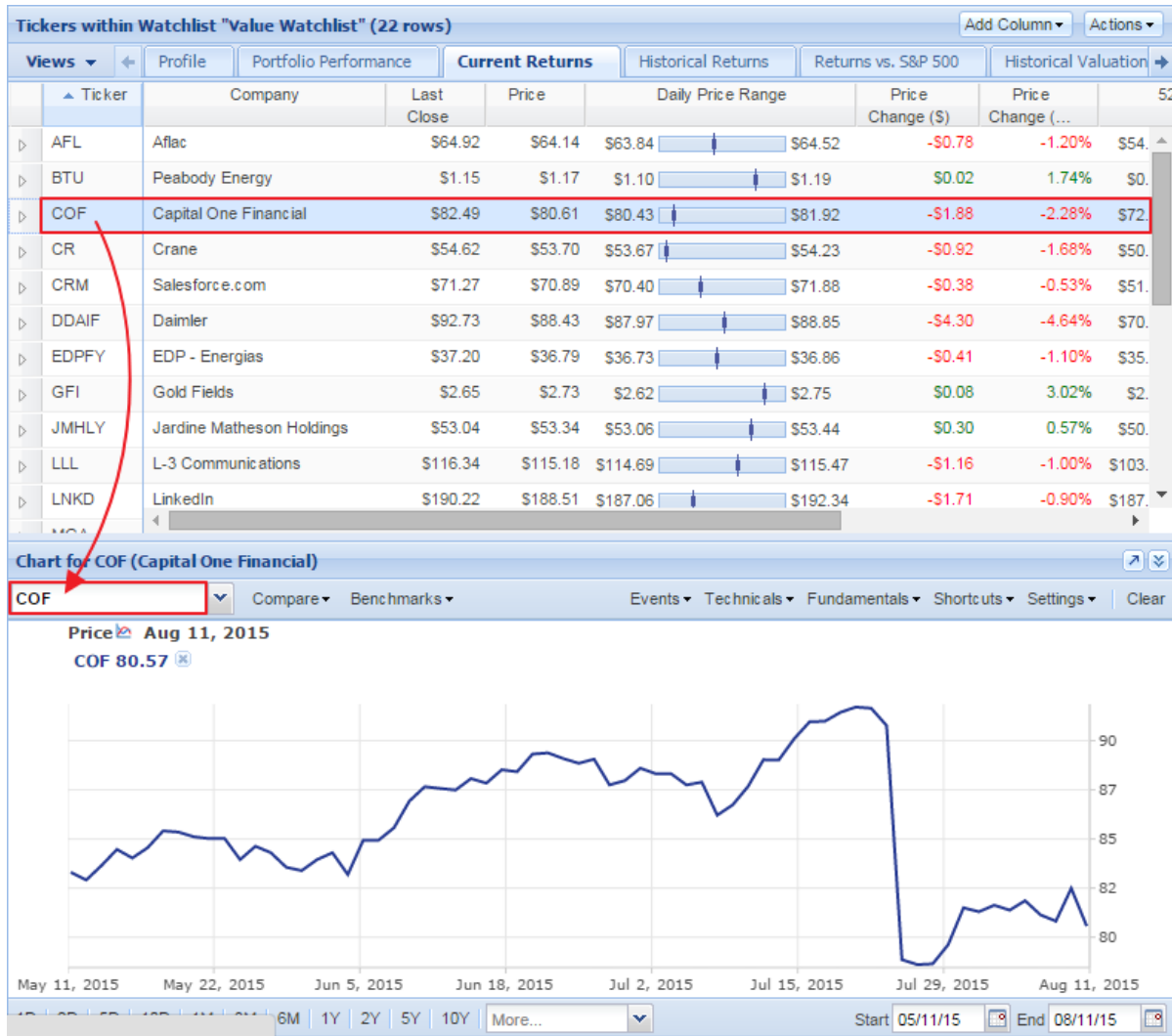
1D | 2D | 5D | 10D | 1M | 3M | 6M | 1Y | 2Y | 5Y | 10Y | More...

Start: 05/11/15 | End: 08/11/15



## BASICS OF NAVIGATION

The row selected in the Table also populates the **Chart**:



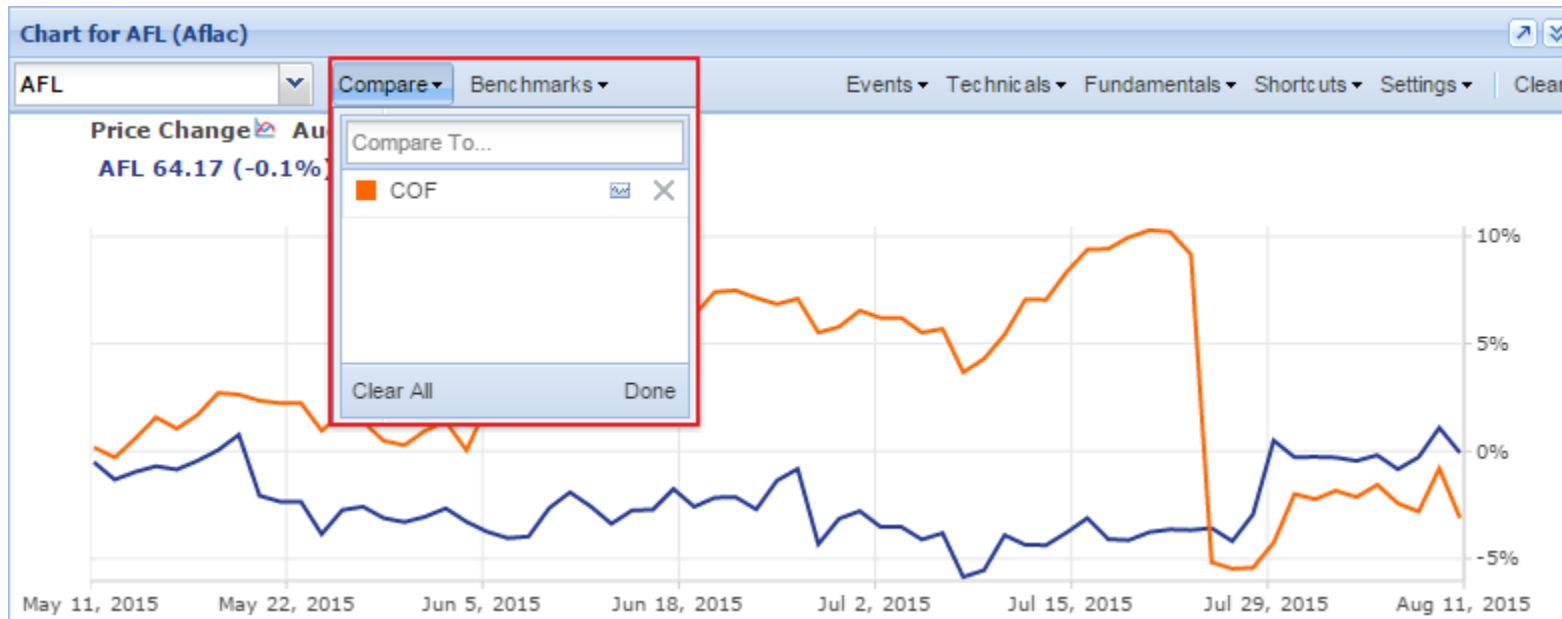
You can **unlink** the Table and Chart via the Chart's Settings menu. This allows you to work in the Table without affecting what you see in the Chart.





## BASICS OF NAVIGATION

To add other items to the Chart, you can enter tickers, portfolios, and more in the Compare box:

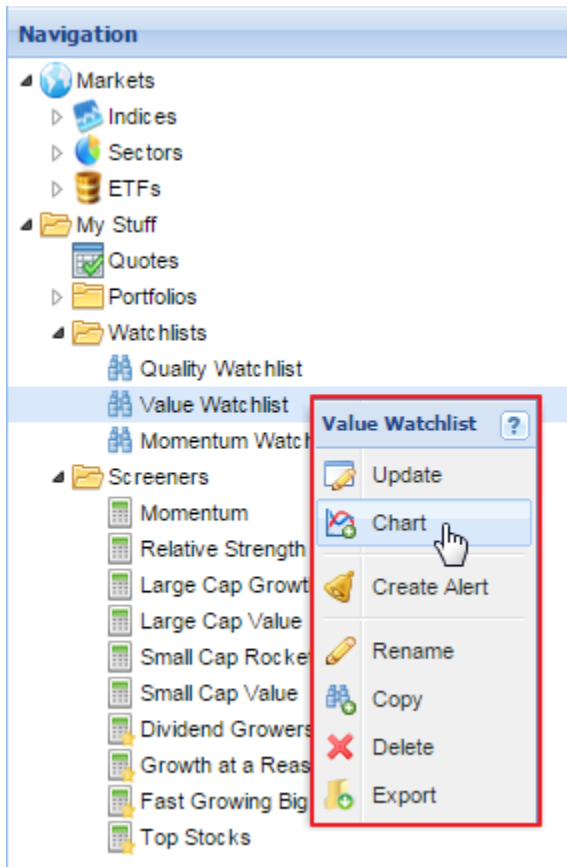



And don't forget to test out what that little blue button next to the 'X' does!



## BASICS OF NAVIGATION

You can also add to the Chart by **right-clicking** any item in the Table or Navigation panel and selecting “Chart”:



As you can see above, right-clicking gives you a lot of useful options. In fact, right-clicking is a crucial way to explore Stock Rover. The right-click menus can be reached without a right click button just by hovering over an element so that a drop-down carrot appears, like this one: 



## BASICS OF NAVIGATION

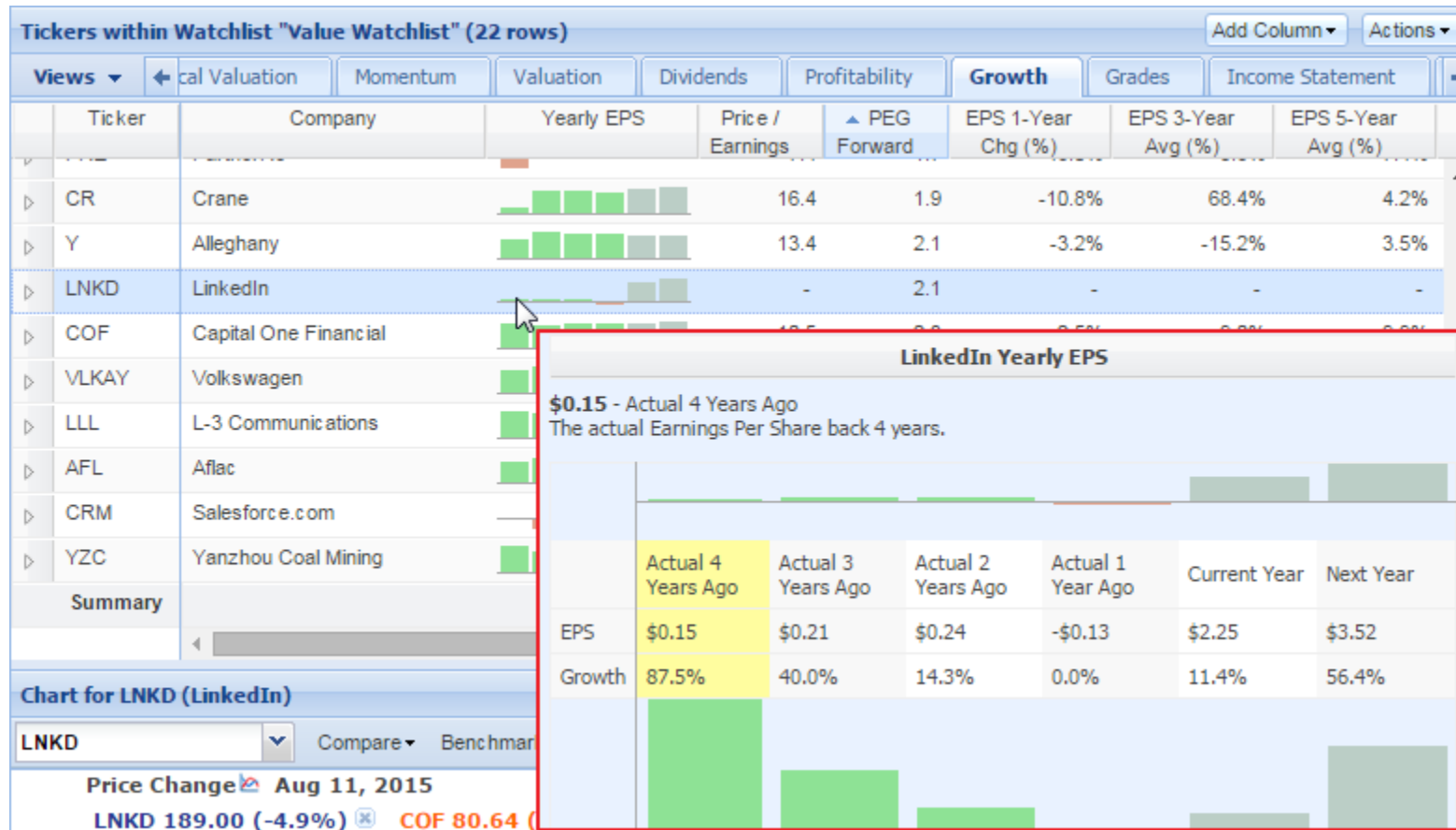
**The Start Menu** is another great way to find Stock Rover tasks and features. Use the buttons and searchbox/drop-down menu to find the tasks you are looking for. Once you are more familiar with Stock Rover, customize the menu's buttons so that it contains your most commonly used tools.

The image shows the 'Start' menu in the Stock Rover application. The menu is titled 'Start' and contains a grid of buttons for various tasks: Run Screener, Manage Alerts, Create Watchlist, Update Watchlist, Create Portfolio, Update Portfolio, Plan Trades, Rebalance Portfolio, Analyze Portfolios, and Browse Library. Below the grid is a search box labeled 'Search all actions...' with a dropdown arrow. A red box highlights the search box and a 'Customize' button to its right. A red arrow points from the 'Customize' button to the search box. The search dropdown is open, showing a list of actions including 'Add Column', 'Add Note', 'Analyze Portfolios', 'Browse Library', 'Change Columns', 'Chart All Indices', 'Chart All Portfolios', 'Chart All Sectors', 'Chart All Watchlists', 'Create Alert', 'Create Portfolio', 'Create Portfolio Folder', 'Create Screener', 'Create View', 'Create Watchlist', and 'Export Table as CSV file'. The background shows a partial view of a stock chart with a table of stock symbols: FMC, AIG, BAC, JOE, SHLI, IPML, SRS, and Sun.



## BASICS OF NAVIGATION

**Tooltips** are informational boxes that allow Stock Rover to seamlessly deliver information to you. For example, if you hover over a graphical metric in the Table like Yearly EPS, you'll get a tooltip with much more detail than what is shown in the Table cell alone:



## BASICS OF NAVIGATION

If you hover over a ticker in the Table, Quotes Box, or Chart, you'll see a “**ticker info tooltip**” like the one below:



The beauty of this particular tooltip is that it allows you to reference basic stats about any ticker in an instant, without even having to click. If you don't want to see ticker info tooltips, you can turn them off in the account preferences window.



## OKAY, LET'S ROVER!

While of course there is more we could teach you about Stock Rover, we think the best way is to learn the program is by using it. So we've created a few lists of **simple tasks for you to try out**. Once you get through these, move on to the next page for more. Keep in mind that there are often multiple ways to accomplish the same task in Stock Rover, and there is at least one easy way to do everything on this list.

If you get stuck, consult our website help pages, video library, or our support team. See the Help menu in the top righthand corner of the Stock Rover screen to access these resources.

Ready? Give these a try...

1. Open the Dow Jones Industrial Average (DJIA) index in the Table.
2. Add three stocks to the Quotes Box and check "Include in Table," so that they can be compared with the tickers in DJIA.
3. Now, show only those three stocks in the Table (*hint*: remember the Navigation panel is what controls the Table contents).
4. Chart all three stocks at the same time (*hint*: try multi-selecting their rows).
5. Add an event, a technical, and a fundamental to the Chart.
6. Add the S&P 500 to the Chart.
7. Now, set the S&P 500 as a baseline (AKA "flatline" it). This is sort of a hidden feature, but it's easy once you know where it is!

Good start! See the next page for more getting started tasks that will help you develop a workflow in Stock Rover.



## DEVELOPING A WORKFLOW IN STOCK ROVER

Now let's do some more work in the Table:

1. Switch to a new Table view (tabs at the top of the Table).
2. Add a column to this view.
3. Sort the Table by any column.
4. Filter the stocks in the Table by any metric in your current view..
5. Save the filter (or filters) as a screener (*hint*: see the Table's Actions menu).
6. Add more criteria to this screener. For example, Dividend Yield > 2 (*tip*: notice how you can preview the number of passing stocks as you add filters to your screener).
7. When you're done modifying the screener, click "Update." The screener results will now load in the Table.
8. Save these results as a watchlist.

Nice work! We hope these tasks have given you a sense of how you can easily customize Table views and your screeners to suit your needs. See the next page to discover more actions, like charting a portfolio, finding industry peers, and charting candlesticks.



## DEVELOPING A WORKFLOW IN STOCK ROVER

Now to explore just a few of the portfolio tools available in the Basic membership...

1. Display all portfolios in the Table.
2. Find the portfolio allocation pie chart (*hint*: see the Insight panel).
3. Find portfolio news and open a news story about a stock.
4. Chart a portfolio.
5. Chart all portfolios (*hint*: use the “Portfolios” row in the Navigation panel).

And some of the charting functions...

1. Clear the Chart. Then chart a single stock.
2. Chart the stock in candlesticks.
3. Now, switch to Price %.
4. Add a ticker to the Chart via the Compare box.
5. Zoom in on a section of the Chart (*hint*: select a section with your mouse).
6. Zoom back out.
7. Change the Chart period.

Go you! See the last page to explore sectors, get analyst earnings estimates, compare to peer stocks, and more.





## DEVELOPING A WORKFLOW IN STOCK ROVER

Let's dig in deeper on a single stock. Here are a variety of actions you might take when you are investigating a stock:

1. Open a sector in the Table.
2. Then, open one of its industries in the Table.
3. Change the stock that is displayed in the Insight panel.
4. Link to the company's homepage.
5. Link to the company's annual or quarterly reports
6. Find analyst estimates for the stock (*hint*: see the Detail tab).
7. Open the Peers tab of the Insight panel.
8. Filter peers on any metric.
9. Now, load the filtered list of peers in the Table.
10. Color a few rows in the table.
11. Group the table by color.
12. Browse the Library for screeners, watchlists, sample portfolios, and even Table views (*hint*: use the Start menu to open the Library).

Go ahead and import a few items into your account!

You've now mastered a huge variety of actions in Stock Rover, great job! We encourage you to keep testing out different actions on your own to discover even more. To try out everything Stock Rover has to offer, including advanced screening and portfolio analysis tools, **activate a 14-day free trial of Stock Rover Premium**. To do this, select "Begin Premium Trial" in the Account drop-down menu in the top righthand corner of the screen. No payment information is necessary to begin the trial. Learn more at <http://www.stockrover.com/about-premium-trial.html>. Enjoy!

