

Library Screeners

17 Factor Growth Stock Ranker

Ranks stocks according to 17 factors that are focused on Growth (35%), Valuation (30%), Efficiency (20%) and Price performance and momentum (15%). Selects stocks that are mid cap and above (market cap > 2 billion).

Created by: Howard Reisman

52 Week High (Large Caps)

Large cap stocks that have hit their 52-week high in the last day.

Created by: Stock Rover Team

52 Week Low

Stocks that have hit their 52-week low in the last day.

Created by: Stock Rover Team

Analyst Picks

Stocks with a buy consensus from analysts.

Created by: Stock Rover Team

Bargain Hunter

Screens for especially good deals on mid and large cap GARP (growth at a reasonable price) stocks.

Created by: Stock Rover Team

Bargain Hunter Ranker

This screener searches for mid and large cap GARP (growth at a reasonable price) companies that may be especially good values.

Created by: Stock Rover Team

Blue Chip Finder

Seeking blue chips. This screener finds very large companies with average or below average

beta and modest dividend growth over the past 5 years. The hope is to find low-risk, slow-growing companies that are similar to companies found on the DJIA.

Created by: Stock Rover Team

Buffettology Inspired

This screener is based on criteria described in the bestselling Buffettology book. The company should have a 10-year track record of generally increasing EPS with no negative earnings years; long-term debt not more than 5 times annual earnings; average ROE over the past ten years at least 15%, average ROIC over the last 10 years at least 12%, and earnings yield should be higher than the long term Treasury yield.

Created by: Stock Rover Team

CAN SLIM

Screens for baseline quantitative criteria in the CAN SLIM strategy.

Created by: Stock Rover Team

CAN SLIM Basic

A Basic version of the CAN SLIM screener, screening on most quantitative CAN SLIM criteria.

Created by: Stock Rover Team

Capital & Operating Efficiency

A screener ranking on performance in capital and operating efficiency metrics, including those relative to industry and sector. Small caps are excluded.

Created by: Stock Rover Team

Capital Efficiency

A screener composed of Stock Rover capital efficiency metrics.

Created by: Howard Reisman

Cheapest Large Companies

This screen selects the 25 cheapest mid cap and large cap companies vs. their 5 year average considering the following metrics Price/Book, Price/Tangible Book, Price/Sales and Price/Earnings, each equally weighted.

Created by: Stock Rover Team

Consumer Cyclical Growth

Looking for growth stocks in the consumer cyclical (discretionary) sector. 60% of the ranking weight is on recent growth, 20% on expected earnings growth, and 20% is on valuation. Additionally, passing companies must have an ROE and ROA that is better than their industry average. Micro caps are excluded.

Created by: Stock Rover Team

Daily Winners

A list of daily winners up at least 5% on at least double volume today. Used to find newly hot stocks.

Created by: Buzz 339

Dividend Consistency

Companies who have consistently maintained or increased their dividends every year for a 5 year period, with a current payout ratio at or less than 60%.

Created by: Stock Rover Team

Dividend Growth

A screener composed of Stock Rover dividend growth metrics.

Created by: Howard Reisman

Dividend Yield

Find companies with good dividends where the dividends are increasing over time. The payout ratio can't be too high. Looking only for companies mid-sized or larger.

Created by: carboniden

Dividends + Great Free Cash Flow

Find companies that are inexpensive as valued by Free Cash Flow that are also consistently growing sales, operating income and earnings over a 5 year period. Minimum dividend yield of 1%.

Created by: Stock Rover Team

Dividends Likely To Be Cut

This screener looks for stocks whose earnings and cash flow have decreased in the past year,

but whose (already high) payout ratio has increased. This indicates that the dividend may not be sustainable over time.

Created by: Stock Rover Team

Dividends Not Cut for 10 Years

This equation screener finds companies that have not cut dividends for the past ten years.

Created by: Thud

Dogs - Dividend Growth

A version of the Dogs of the Dow that incorporates dividend growth and safety, in addition to dividend yield.

Created by: Stock Rover Team

Dogs - S&P 100 Out of Favor

Looks for 10 dividend-paying stocks that are the most out of favor on the S&P 100. Originally inspired by the Dogs of the Dow, but with a larger population and a stronger focus on price performance.

Created by: Stock Rover Team

Dogs - Value

A version of the Dogs of the Dow screener that focuses on inexpensive valuation using forward P/E and 5-year P/E range. Also includes a filter with a minimum dividend yield.

Created by: Stock Rover Team

Dogs of the Dow

Find the current Dogs of the Dow - the 10 highest dividend yielders in the DJIA. According to the original Dogs of the Dow strategy, these 10 should be selected at the end of the year, bought in an equal-allocation portfolio, and held for a year. The strategy can be repeated year after year.

Created by: Stock Rover Team

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).

Created by: Stock Rover Team

ETF Asia Developed

Asia developed country focused ETFs.

Created by: Stock Rover Team

ETF Big Dogs

Large ETFs having net assets of at least 4 billion dollars and a one month average volume of at least 500,000 shares traded per day.

Created by: Stock Rover Team

ETF Dividend Growth

ETFs with good dividends yields and where dividends are increasing over time.

Created by: Stock Rover Team

ETF Dividend Yield

ETFs with good dividends yields and have a Morningstar rating of 3 or above.

Created by: Stock Rover Team

ETF Emerging Markets

Emerging market ETFs with at least 1 billion in net assets and a Morningstar rating of 3 or above.

Created by: Stock Rover Team

ETF Enhanced Index Funds

ETFs that are defined as enhanced index funds which means implementing a variety of enhancement strategies to try and beat the return of the tracking index such as timing, sector bets and leverage.

Created by: Stock Rover Team

ETF Europe

European focused ETFs with assets of at least 1 billion dollars.

Created by: Stock Rover Team

ETF Large Cap Growth

Large cap growth ETFs with at least 2 billion dollars in net assets.

Created by: Stock Rover Team

ETF Large Cap Value

Large cap value ETFs with at least 2 billion dollars in net assets.

Created by: Stock Rover Team

ETF Low Expenses

ETFs with an expense ratio of 10 basis points or less that have at least 20 billion in net assets and a Morningstar rating of three stars or above.

Created by: Stock Rover Team

ETF Mid Cap Growth

Mid cap growth ETFs.

Created by: Stock Rover Team

ETF Mid Cap Value

Mid cap value ETFs.

Created by: Stock Rover Team

ETF Quality

ETFs with top Morningstar ratings, long manager tenure and low expenses.

Created by: Stock Rover Team

ETF Small Cap Growth

Small cap growth ETFs..

Created by: Stock Rover Team

ETF Small Cap Value

Small cap value ETFs.

Created by: Stock Rover Team

ETF Sustainable

Sustainable ETFs with a Morningstar rating of at least 3 stars.

Created by: Stock Rover Team

Efficiency & Management

A ranked screener searching for companies with strong capital efficiency and quantitative indicators of good management.

Created by: Stock Rover Team

Fair Value

Screen to find the 50 stocks that have the greatest margin of safety based on their computed fair value relative to their price.

Created by: Howard Reisman

Financial Services Growth

Looking for growth stocks in the financial services sector. 60% of the ranking weight is on recent growth, 20% on expected earnings growth, and 20% is on valuation. Additionally, passing companies must have an ROE and ROA that is better than their industry average. Micro caps are excluded.

Created by: Stock Rover Team

GARP Ranked Screener

Find the top 50 growth at a reasonable price (GARP) stocks. This screener is 40% weighted on valuation metrics and 60% weighted on growth metrics.

Created by: Stock Rover Team

GARP by Equation

Finding stocks with positive trends in growth and valuation.

Created by: Stock Rover Team

Graham Enterprising Screener

The Benjamin Graham Enterprising Screener focuses on intrinsic value based on a company's earnings, dividends, assets and financial strength. Note this screener uses for the P/E ratio the lowest 30% of sector, not of the market.

Created by: Erica Reisman

Great Free Cash Flow

Find companies that are inexpensive as valued by Free Cash Flow that are also consistently growing sales, operating income and earnings over a 5 year period.

Created by: Stock Rover Team

Growth + Growth

Nothin' but growth.

Created by: Stock Rover Team

Growth + Profitability Ranker

Stocks in the top 30% of their industry and sector for growth, ranked on growth and profitability

Created by: Stock Rover Team

Growth Ranker

A simple formula that ranks stocks on EPS, sales, and operating income growth.

Created by: Stock Rover Team

Growth Screener

A screener composed of Stock Rover growth metrics.

Created by: Howard Reisman

Growth at a Reasonable Price

A screener composed of Stock Rover GARP (growth at a reasonable price) metrics.

Created by: Howard Reisman

Healthcare Growth

Looking for growth stocks in the healthcare sector. 60% of the ranking weight is on recent growth, 20% on expected earnings growth, and 20% is on valuation. Additionally, passing companies must have an ROE and ROA that is better than their industry average. Micro caps are excluded.

Created by: Stock Rover Team

Healthy Balance Sheet

This screener finds stocks that have a reasonably healthy balance sheet with regards to Debt/Equity, Interest Coverage, and Current Ratio.

Created by: Stock Rover Team

High Growth

Stocks with an A in growth from Morningstar, plus an over 15% jump expected in next year's EPS. A minimum financial health grade of C and debt/equity below 0.6 aim to ensure that these growing companies are financially sound.

Created by: Stock Rover Team

High Shareholder Yield

A simple screener looking for mid cap & larger companies with the highest shareholder yield and a payout ratio below 60. Shareholder yield is the total of share buybacks and dividend payments to common shareholders over the past twelve months as a percent of the current market capitalization.

Created by: Stock Rover Team

Improving Analyst Ratings

Stocks with increasingly favorable analyst ratings.

Created by: Stock Rover Team

Industrials Growth

Looking for growth stocks in the industrials sector. 60% of the ranking weight is on recent growth, 20% on expected earnings growth, and 20% is on valuation. Additionally, passing companies must have an ROE and ROA that is better than their industry average. Micro caps are excluded.

Created by: Stock Rover Team

Industry Outperformers

Find the top 50 stocks that have consistently outperformed their industries. Outperformance over longer periods has higher weight. Must be mid cap or larger.

Created by: Stock Rover Team

Large Cap Growth with Momentum

Find large companies (greater than 8 billion in market cap) that are exhibiting strong revenue and earnings growth and are still reasonably priced. Also we want to ensure a company's stock price is performing reasonably well vs. its industry and the S&P 500.

Created by: Howard Reisman

Large Cap Momentum Screener

Large cap stocks experiencing price momentum.

Created by: Stock Rover Team

Large Cap Rockets

Find large cap companies (over 10 billion dollars in market cap) that are growing sales and earnings rapidly and are showing strong price momentum.

Created by: Stock Rover Team

Large Cap Value

Find large companies (greater than 5 billion in market cap) that are inexpensive by traditional measures such as low price to earnings, price to sales and price to book. These companies should still be growing sales and earnings.

Created by: Howard Reisman

Large/Mid Cap Dividend Growers

Find large dividend-paying companies where the dividends are increasing over time. The payout ratio can't be too high.

Created by: Stock Rover Team

Long Term Growth

A screener for a continuation of the current market trends. Solid economy, reasonable growth, and low interest rates that may rise slightly in the future. Companies that pass should be mid cap or larger, growing, getting more efficient and not be reliant on debt for financing. Screener requires the import of the custom metric Net Cash as a % of market cap.

Created by: Howard Reisman

Low PEG Companies

Companies with the lowest trailing and forward PEG ratios along with low Price to Earnings and Price to Book ratios.

Created by: Stock Rover Team

Magic Formula - Above \$1B

A value screener based on the Magic Formula Investing principles that Joel Greenblatt lays out in his book The Little Book that Beats the Market. Minimum market cap of \$1B is set.

Created by: Stock Rover Team

Magic Formula - No Low P/E

A value screener based on the Magic Formula Investing principles that Joel Greenblatt lays out in his book The Little Book that Beats the Market. Stocks with P/E below 5 are excluded to weed out companies that may have had an unusual last year or are using data in an unusual way. The minimum market cap is set at \$100M.

Created by: Stock Rover Team

Magic Formula Like

Magic formula investing is a term referring to an investment technique outlined by Joel Greenblatt that uses the principles of value investing. This screen is similar to, but not exactly the same as Greenblatt's screen. Return on Invested Capital is used rather than Return on Capital. Also PE / Price is used rather than EBIT / EV for Earnings Yield.

Created by: Stock Rover Team

Magic Formula Screener

A value screener based on the Magic Formula Investing principles that Joel Greenblatt lays out in his book The Little Book that Beats the Market.

Created by: Stock Rover Team

Mid Cap Growth

Find mid cap companies (between 2 billion and 10 billion dollars in market cap) that have strong EPS growth (past and expected), as well as strong sales growth in the last 5 years.

Created by: Stock Rover Team

Mid Cap Momentum Screener

Mid cap stocks experiencing price momentum.

Created by: Stock Rover Team

Mid Cap Rockets

Find mid cap companies (between two and 10 billion dollars in market cap) that are growing sales and earnings rapidly and are showing strong price momentum.

Created by: Stock Rover Team

Mid Cap Value

Find mid cap companies (between 2 billion and 10 billion dollars in market cap) that are inexpensive by traditional measures such as low price to earnings, price to sales and price to book. These companies should still be growing sales and earnings.

Created by: Stock Rover Team

Momentum

Find stocks with strong price momentum and consistent outperformance vs. the S&P 500.

Created by: cbaptista

Momentum & Sector Outperformance

Seeking momentum stocks that are outperforming their sectors (which are outperforming the S&P 500)

Created by: Stock Rover Team

Momentum Screener

A screener composed of Stock Rover price momentum metrics.

Created by: Howard Reisman

Morningstar Grades

Find stocks that are graded A by Morningstar in Financial Health and Profitability and have an A or B grade for Growth.

Created by: Howard Reisman

Novy-Marx Quality

This screener creates the relatively simple but powerful Novy-Marx Quality screener. It looks for quality as measured by gross profits over total assets, momentum as measured by 1 year

price change and value as measured by low price to book ratios. This screener also filters out stocks with very low market caps and trading volumes.

Created by: Stock Rover Team

O'Shaughnessy Cornerstone Growth

This growth screener was laid out in James O'Shaughnessy's What Works on Wall Street. It combines relative strength, earnings consistency, and a price-to-sales value measure. To screen out illiquid stocks, only those with market caps greater than \$225M are considered. The original screener uses relative strength to rank stocks, whereas we use return versus the S&P 500.

Created by: Stock Rover Team

Operational Outperformers Screen

A screener composed of Stock Rover operational efficiency metrics.

Created by: Howard Reisman

Out of Favor Screener

A screener composed of Stock Rover metrics that can indicate a stock is out of favor as evidenced by trading near its lower historical valuations.

Created by: Howard Reisman

Peer Outperformance with Safety Features

Stocks with consistent long term outperformance vs. their industry and sector. The screener also looks for high institutional ownership, low Beta, respectable financial health, profitability, and growth grades, to help find relatively low-risk picks.

Created by: Stock Rover Team

Piotroski F9 - Mid and Large Cap

Mid and large cap companies scoring a 9 on Piotroski's F score, a financial health metric. See <https://www.stockrover.com/blog-piotroski-high-f-score-screener.html> for details about this metric.

Created by: Howard Reisman

Piotroski High F-Score

This screener uses 9 criteria that look for companies that have solid financials that are getting

better. The original 9-point system was developed by Joseph Piotroski, a professor of accounting. Passing companies must have a score of 9.

Created by: Stock Rover Team

Piotroski High F-Score - Large Cap

Large cap companies scoring an 8 or a 9 on Piotroski's F score, a financial health metric. See <https://www.stockrover.com/blog-piotroski-high-f-score-screener.html> for details about this metric.

Created by: Stock Rover Team

Price Outperformers Screen

A screener composed of Stock Rover relative price performance metrics.

Created by: Howard Reisman

Price-to-Free Cash Flow

This screener selects stocks that have strong cash flow, which can signal a company has the resources to fuel growth in earnings, dividends, and asset values.

Created by: Stock Rover Team

Profitability vs. Industry

Ranked screening finding mid and large cap stocks that have strongest profitability indicators compared with their industries. Excludes Energy sector.

Created by: Stock Rover Team

Quality-Oriented GARP

A screener of GARP metrics, with gross profitability (a key component of the Novy-Marx Quality screener) factored in.

Created by: Stock Rover Team

Recent Growth Ranker

Ranks mid and large cap stocks on recent growth and expected earnings growth.

Created by: Stock Rover Team

Relative Strength

Find stocks with strong relative strength defined as consistent outperformance vs. the S&P 500.

Created by: Howard Reisman

Revert to Mean

S&P 500 stocks that have performed as well or better than the S&P 500 over a 5 year period. However in the last year, they have underperformed the S&P 500 as well as their sector and industry. In the last month they seemed to be re-establishing some good momentum.

Created by: Stock Rover Team

S&P 500 Best Dividend Growers

The Best S&P 500 stocks for dividend growth over a 5 year period. Consider stocks that yield at least 2.5% and have grown their EPS by at least 5% per year compounded over the last 5 years.

Created by: Stock Rover Team

S&P 500 Fastest Growers

The 25 fastest growing S&P 500 companies by Revenue, Operating Income and EPS growth over the last 5 years. Also consider the expected EPS growth for next year.

Created by: Stock Rover Team

Safe Dividend Growth

This hybrid screener looks for modest dividend-growing stocks that have outperformed their sector and industry in the last year. Sales growth is weighted to ensure that the companies are increasing their top lines, while the financial safety decile helps find stocks that are financially healthy relative to their sector peers.

Created by: Stock Rover Team

Safe Performers

Stocks with high institutional ownership, low Beta, respectable financial health, value and quality grades and long term outperformance vs. the S&P 500.

Created by: Stock Rover Team

Safe Small Caps

Small caps that are liquid, have positive earnings and free cash flow, have good to average

financial health, are at least 50% owned by institutions, and have less than 10% short interest. The hope is to find small caps that are less risky than the average small cap.

Created by: Stock Rover Team

Scores

The Scores screener finds stocks whose scores for Value, Growth, Quality and Sentiment scores in the top 20% along with a Piotroski F score of at least 6 and an Altman Z-Score of at least 3.0 from over 4000 US listed stocks.

Created by: Howard Reisman

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.

Created by: Stock Rover Team

Short Candidates - Deteriorating Fundamentals

This screen looks for stocks with negative and decreasing cash flow, increasing debt, and decreasing margins; these stocks should still be liquid. Stocks that pass this screen could be candidates to short.

Created by: Stock Rover Team

Small + Mid Cap Growth

Finds small and mid cap growth stocks. Minimum average volume ensures that the stocks are liquid.

Created by: Stock Rover Team

Small Cap Growth

This screener was built with criteria used in the BetterInvesting methodology to find promising small-cap growth stocks.

Created by: Stock Rover Team

Small Cap Growth Quant

Looking for growing small cap companies that have upward earnings and efficiency trends and not too encumbered by debt. Quant weighted for growth and value.

Created by: Stock Rover Team

Small Cap Growth Ranker

Looking for growing small cap companies (between \$250M & \$2B market cap) that have good earnings and sales growth, increasing ROIC, and decent financial health. Excludes micro caps.

Created by: Stock Rover Team

Small Cap Rockets

Find small cap companies (less than 2 billion dollars in market cap) that are growing sales and earnings rapidly and are showing strong price momentum.

Created by: Stock Rover Team

Small Cap Value Quant

Small caps with inexpensive valuation; good ROE with an upward trend; ranked according to sales and earnings combined with low valuation

Created by: Stock Rover Team

Staples Growth

Looking for growth stocks in the consumer defensive (staples) sector. 60% of the ranking weight is on recent growth, 20% on expected earnings growth, and 20% is on valuation. Additionally, passing companies must have an ROE and ROA that is better than their industry average. Micro caps are excluded.

Created by: Stock Rover Team

Steady Growth and Outperformance

Adapted from a BetterInvesting screener, this Quant seeks good quality companies that are growing EPS and revenue faster than peers.

Created by: BI Space Coast

Stock Rover Dividend Ratings

Find large cap stocks on the NYSE or Nasdaq in the top dividend growth and safety decile of Stock Rover ratings that are also in the top two deciles for price momentum.

Created by: Howard Reisman

Stock Rover Efficiency Ratings

Find large cap stocks on the NYSE or Nasdaq in the top operational and capital efficiency decile of Stock Rover ratings that are also in the top two deciles for price momentum.

Created by: Howard Reisman

Stock Rover Financial Strength Ratings

Find large cap stocks on the NYSE or Nasdaq in the top financial strength decile of Stock Rover ratings that are also in the top two deciles for price momentum.

Created by: Howard Reisman

Stock Rover Growth Ratings

Find large cap stocks on the NYSE or Nasdaq in the top growth decile of Stock Rover ratings that are also in the top two deciles for price momentum.

Created by: Howard Reisman

Stock Rover Momentum Ratings

Find large cap stocks on the NYSE or Nasdaq in the top price momentum decile of Stock Rover ratings.

Created by: Howard Reisman

Stock Rover Overall Ratings

Find large cap stocks on the NYSE or Nasdaq in the top overall decile of Stock Rover ratings.

Created by: Howard Reisman

Stock Rover Top Rank and Momentum

Find large cap stocks on the NYSE or Nasdaq in the top overall decile of Stock Rover ratings that are also in the top two deciles for price momentum.

Created by: Howard Reisman

Stock Rover Valuation Ratings

Find large cap stocks on the NYSE or Nasdaq in the top valuation decile of Stock Rover ratings that are also in the top two deciles for price momentum.

Created by: Howard Reisman

Strong Buys

This screener ranks the top 50 stocks with a high margin of safety that are also in favor with the market as shown by a sentiment score in the top quartile and a recent buy sign from the MACD technical indicator. The universe of stocks are the 4000+ stocks that trade on the US exchanges with a market cap that exceeds 250M.

Created by: Stock Rover Team

Tech Growth

Looking for growth stocks in the tech sector. 60% of the ranking weight is on recent growth, 20% on expected earnings growth, and 20% is on valuation. Additionally, passing companies must have an ROE and ROA that is better than their industry average. Micro caps are excluded.

Created by: Stock Rover Team

The Increasing Altman Z Score Screener

Screening for Stocks with an increasing Altman Z Score over the past five years and a current Z score greater than 3.

Created by: Stock Rover Team

Top Outperformers

Find the top 50 stocks that have shown consistent price outperformance vs their industry, sector and the S&P 500 across all time periods.

Created by: Stock Rover Team

Top Stocks

Top Screen (determined by backtesting multiple strategies)

Created by: Howard Reisman

Valuation + Growth

A ranked screener searching for companies with the best combination of high growth and low valuation.

Created by: Stock Rover Team

Value + Dividends

Find dividend-paying companies that are inexpensive by traditional measures such as low price to earnings, price to sales and price to book. These companies should still be growing sales and earnings.

Created by: Stock Rover Team

Value Screener

A screener composed of Stock Rover value metrics.

Created by: Howard Reisman

Value vs. Peers

Find stocks that are inexpensive relative to their industry across a number of valuation metrics (especially book value) and are performing at least as well as their industry and the S&P 500 over the last month and the last three months. Market cap must be a minimum of \$2B.

Created by: Stock Rover Team

Well Rounded Mid Caps

Mid cap stocks that overall perform well in a sampling of growth, profitability, financial health, valuation, and performance metrics.

Created by: Stock Rover Team

Yield Screener

A screener composed of Stock Rover dividend yield metrics.

Created by: Howard Reisman

Library Portfolios

Bill Ackman - Pershing Square

Updated 3/31/2019

Created by: Stock Rover Team

Bill Gates Like

Bill and Melinda Gates Foundation Trust Holdings as of March 31st, 2019. Note the portfolio share counts are divided by 1000 vs. the actual share counts to keep the sample portfolio in the millions rather than the billions.

Created by: Stock Rover Team

Bill Nygren - Oakmark Select

Holdings of Bill Nygren of Oakmark Select as of 3/31/19. Quantities are divided by 1000. Oakmark Investment Philosophy: We are value investors, which means that we invest in companies that we believe trade at a substantial discount to what we consider to be their true business value. We are patient investors, not market timers. We believe that, over time, the price of a stock will rise to reflect the value of the underlying company. Every stock purchase is viewed as if we were buying a piece of a business, not just a stock certificate. We believe that this approach to investing allows for significant investment returns while reducing risk.

Created by: Stock Rover Team

Bruce Berkowitz - Fairholme Fund

These are the stocks held by legendary investor Bruce Berkowitz as of March 31st, 2019. Actual quantities have been divided by 1000.

Created by: Stock Rover Team

Carl Icahn - Icahn Capital Management

Carl Icahn holdings as of March 31st, 2019. This portfolio holds 17 stocks. Actual quantities are divided by 1000.

Created by: Stock Rover Team

Daniel Loeb - Third Point

Reported Daniel Loeb Top 25 holdings as of March 31st, 2019. Please note that the portfolio

share counts are divided by 1000 vs the actual share counts to keep the sample portfolio in millions rather than billions. Third Point LLC is an SEC-registered investment adviser based in New York City. The firm was founded in 1995 by Daniel S. Loeb, who serves as CEO and oversees all investment activity. Daniel Loeb has more than 27 years of experience in the financial markets, with particular emphasis on special situation equities, distressed debt and risk arbitrage. Third Point employs an event-driven, value-oriented investment style. The Firm seeks to identify situations where we anticipate a catalyst will unlock value. We focus on delivering exceptional risk adjusted returns with limited market exposure.

Created by: Stock Rover Team

David Einhorn - Greenlight Capital Top 25

These are the top 25 stocks in David Einhorn's portfolio as of March 31st, 2019. The share quantities have been divided by 1000 so the sample portfolio total value is in the millions and not the billions (as it actually is).

Created by: Stock Rover Team

David Katz - Matrix Advisors Value Top 25

As of March 31st 2019 this portfolio held 35 stocks. These are the top 25. Shares listed are actual quantities. Matrix employs Benjamin Grahams value investment precepts as the predominant guide in our investment process. Our primary objective is to identify a diversified group of financially strong companies, each of whose stock we feel is traded at a substantial discount to its intrinsic value; i.e., the price an astute entrepreneur would pay to acquire a business outright. We call ourselves Opportunistic Value Investors because we are willing to scan the entire economic spectrum for potential investment candidates. Unlike some of our peers, we believe that value can be found in all sectors and industries. We therefore do not a priori rule out any sector; conversely we do not feel the need to have a presence in any particular sector. The core effort in our research process is to determine a realistic intrinsic value for a companys stock and then, if fundamentally attractive, to purchase the stock at a substantial discount to this intrinsic value. Our focus is on large capitalization stocks, and our expectation is that we will typically hold them for one to three years.

Created by: Stock Rover Team

David Rolfe Top 25 - Wedgewood Partners

David Rolfe holdings as of March 31st 2019 . This is the top 25.

Created by: Stock Rover Team

David Tepper Top 25

As of March 31st, 2019 David Tepper of Appaloosa Management held 51 Stocks, these are the top 25. The share quantities have been divided by 1000.

Created by: Stock Rover Team

David Winters - Wintergreen Advisors

The portfolio of David Winters. Actual quantities shown below. Last updated March 31st, 2016.

Created by: Stock Rover Team

Dividend Growers Strategy

A portfolio using a dividend growth strategy. Goal is capital & income growth with better performance than the S&P 500 but with similar risk. Portfolio contains 25 large(ish) cap companies, across at least 5 sectors and 10 industries. No sector is more than 30% of the overall portfolio and no industry more than 20%. No individual position is less than 2% or more than 6 % of the overall portfolio. Managed by SR staff.

Created by: Stock Rover Team

Dodge & Cox Top 25

Reported Dodge & Cox holdings as of December 31st, 2018. Please note that the portfolio share counts are divided by 1000 vs the actual share counts to keep the sample portfolio in millions rather than billions. These are the top 25 stocks listed in the portfolio, the full portfolio holds 67 stocks. The Fund invests primarily in a broadly diversified portfolio of common stocks. In selecting investments, the Fund invests in companies that, in Dodge & Cox's opinion, appear to be temporarily undervalued by the stock market but have a favorable outlook for long-term growth. The Fund focuses on the underlying financial condition and prospects of individual companies, including future earnings, cash flow and dividends. Various other factors, including financial strength, economic condition, competitive advantage, quality of the business franchise and the reputation, experience and competence of a company's management are weighed against valuation in selecting individual securities.

Created by: Stock Rover Team

ETF All Cap All Style Portfolio

This portfolio gives you equal exposure to growth and value. It also gives equal exposure to small cap, mid cap and large cap companies via six low cost ETFs.

Created by: Howard Reisman

ETF Diversified Dividend Portfolio

A portfolio of 10 diversified dividend focused ETFs that cover a range of approaches including dividend growth, consistency of payments, low volatility, international exposure, small and mid cap exposure and preferred dividend streams.

Created by: Howard Reisman

ETF Growth Portfolio

A low cost all cap ETF growth portfolio.

Created by: Howard Reisman

ETF International Portfolio

A diversified international ETF portfolio

Created by: Howard Reisman

ETF Level 3 Portfolio

This is the ETF Level 3 Portfolio designed by James Cloonan the founder of AAIL. It looks to avoid the problem of mega-cap stocks dominating the weightings of index based returns by using equal cap weighing for index stocks.

Created by: Howard Reisman

ETF Simple Core Portfolio

The simplest ETF model portfolio to give broad exposure to the market with a stronger weighing towards S&P 500 stocks.

Created by: Howard Reisman

ETF Value Portfolio

A low cost all cap ETF value portfolio.

Created by: Howard Reisman

Goldfarb & Poppe - Sequoia

Robert Goldfarb and David Poppe's Sequoia Fund. Last updated March 31st, 2018. The Fund has one of the best long-term track records on Wall Street. Investment Strategy The Fund's investment objective is long-term growth of capital. In pursuing this objective, the fund focuses principally on common stocks that it believes are undervalued at the time of purchase and have potential for growth. A guiding principle is the consideration of common stocks as units of ownership of a business and the purchase of them when the price appears low in relation to the value of the total enterprise. No weight is given to technical stock market studies. The balance sheet and earnings history and prospects of each investment are extensively studied to appraise fundamental value.

Created by: Stock Rover Team

Howard Reisman Dividend Grower Portfolio

This is a portfolio of dividend orientated mid and large cap stocks created on 6/12/19. The stocks are characterized by reasonable yield (not too big), good dividend growth, good earnings growth and low payout ratios. Within the qualifying stocks, the stocks with the largest margin of safety relative to fair value were included in the portfolio.

Created by: Howard Reisman

Howard Reisman High Growth Portfolio

This is a portfolio of high growth mid and large cap stocks created on 6/12/19 based on sales, operating income and EPS growth over the last 5 years. Within the qualifying stocks, the stocks with the largest margin of safety relative to fair value were included in the portfolio.

Created by: Howard Reisman

Howard Reisman MLP Portfolio

This is a portfolio of Master Limited Partnerships (MLPs) that generally pay very high distributions and exhibit distribution growth and good distribution coverage. The portfolio was created on 6/12/19.

Created by: Howard Reisman

Howard Reisman Value Portfolio

This is a portfolio of value orientated mid and large cap stocks created on 6/12/19 based on P/E, P/B and P/S along with consideration for sales and EPS growth. Within the qualifying stocks, the stocks with the largest margin of safety relative to fair value were included in the portfolio.

Created by: Howard Reisman

Income and Growth Portfolio

An income and growth portfolio primarily of common stocks that are us based mid to large cap.

Created by: MJW Assoc

Large Cap Capital Appreciation

A portfolio using a capital appreciation strategy. Goal is growth with better performance than the S&P 500 but with similar risk. Portfolio contains 25 large cap companies, across at least 5

sectors and 10 industries. No sector is more than 30% of the overall portfolio and no industry more than 20%. No individual position is less than 2% or more than 6 % of the overall portfolio. Managed by SR staff.

Created by: Stock Rover Team

Merriman

Paul Merriman Best-In-Class ETF portfolio.

<https://paulmerriman.com/best-in-class-recommended-portfolios-2019/>

Created by: Stock Rover Team

Phoenix Capital Partners Revised

Phoenix Capital Partners Revised Portfolio

Created by: gjkight1

Rick Ferri Core 4 Portfolio

This portfolio carves out U.S. commercial real estate as a separate asset class. Commercial real estate makes up about 13 percent of the U.S. economy and yet represents only 3 percent of the stock market. This is because most commercial real estate is owned privately rather than securitized as a tradable investment. The Core 4 portfolio extends the three fund lazy portfolio into real estate by shifting 10 percent of the equity allocation to the Vanguard REIT ETF (Ticker: VNQ).

Created by: Stock Rover Team

Rick Ferri Three Fund Lazy Portfolio

This portfolio divides the equity portion into a U.S. only fund and international only fund, while keeping the broadly-diversified U.S. investment-grade bond fund the same. This strategy allows an investor to control the amount held in U.S. stocks and foreign stocks. This in turn controls the amount of U.S. dollar investment held and non-US dollar investments. Many people prefer to hold mostly U.S. dollar-denominated investments because they have to pay bills in U.S. dollars. The two Vanguard equity ETFs are Total Stock Market ETF (Ticker: VTI) and the Total International Stock ETF (Ticker: VXUS).

Created by: Stock Rover Team

Rick Ferri Two Fund Portfolio

The two fund portfolio includes a broadly-diversified U.S. investment-grade bond fund and a global stock market fund. Two Vanguard funds that fit these asset classes are the Total Bond Market ETF (Ticker: BND), which holds U.S. Treasury, agency bonds, home mortgage

securities, high quality corporate bonds and a few foreign bond that trade in the U.S., and the Total World Stock ETF (Ticker: VT), which holds stocks from around the globe including U.S. and Canada, Europe and the UK, Asia and Australia and emerging markets. Both funds hold thousands of securities.

Created by: Stock Rover Team

Sample Portfolio - Fang Stocks

The FANG stocks - Facebook, Amazon, Netflix and Google

Created by: Howard Reisman

Seth Klarman - Baupost Group

The top 25 holdings of Seth Klarman of the Baupost Group as of 3/31/2019. Actual quantities are divided by 1000.

Created by: Stock Rover Team

Tweedy Browne Value Top 25

Reported Tweedy Browne holdings as of March 31st, 2019. Shares listed are actual quantities. These are the top 25 stocks listed in the portfolio, the full portfolio holds 41 stocks. The investment management principles practiced by Tweedy, Browne derive from the work of the late Benjamin Graham, professor of investments at Columbia Business School and author of Security Analysis and The Intelligent Investor. Tweedy, Brownes research seeks to appraise the worth of a company, what Graham called intrinsic value, by determining its acquisition value, or by estimating the collateral value of its assets and/or cash flow. The term intrinsic value may also be referred to as private market value, breakup value or liquidation value. The process is more closely related to credit analysis, for as we have said, we are as concerned with the return of our capital as we are with the return on our capital. Investments are made at a significant discount to intrinsic value, which Graham called an investors margin of safety. Investments are generally sold as the market price approaches intrinsic value, with the proceeds reinvested in other situations offering a greater discount to intrinsic value. Adhering to the principles of intrinsic value and margin of safety results in an investment policy that runs counter to the general market psychology, and seeks to reduce the decision to purchase or sell securities to a discipline rather than an art.

Created by: Stock Rover Team

Warren Buffett Top 25

As of March 31st, 2019 Warren Buffett's portfolio held 50 stocks. The top 25 stocks represent over 95% of the value of the portfolio and are listed here. The share quantities have been divided by 1000 so the sample portfolio total value is in the millions and not the billions (as it actually is).

Created by: Stock Rover Team

Weitz Value

Holdings of legendary value investor Wallace Weitz as of 3/31/19. Quantities are divided by 1000. Weitz Investment Philosophy: We have one primary objective: To earn superior investment returns on our clients', and our own, capital without taking unnecessary risks. Our strategy is to try to understand what a rational buyer would be willing to pay for 100% of a given company. Our valuation may focus on asset values, earning power, the intangible value of a company's franchise in its market, or a combination of these variables. We then try to buy shares of the company's stock at a significant discount to this private market value. It is this discount that provides the margin of safety that minimizes the risk of permanent loss of capital.

Created by: Stock Rover Team

Yacktman Focused - Top 25

There are 19 stocks in legendary investor Donald Yacktman's portfolio as of 3/31/19. Actual quantities have been divided by 1,000. The firm seeks to be objective, patient, and diligent in its investment approach. Yacktman Asset Management selects individual securities, analyzing investments from the bottom-up.

Created by: Stock Rover Team

Library Watchlists

3-D Printing

Key 3-D Printing companies as of January 1st, 2019

Created by: Stock Rover Team

5G Networks

Companies that will benefit from the rollout of 5G technology.

Created by: Howard Reisman

Artificial Intelligence

Key Artificial Intelligence companies as of January 1st, 2019

Created by: Stock Rover Team

Bellwether Watchlist

This watchlist is comprised of six ETFs representing the small, mid, and large cap sectors of both the growth and value markets. Use this watchlist to know which way the winds are blowing.

Created by: Howard Reisman

Big Data

Key Big Data companies as of January 1st, 2019

Created by: Stock Rover Team

Cannabis

Stocks involved in the cannabis industry.

Created by: Howard Reisman

Cloud Computing

Key Cloud Computing companies as of January 1st, 2019

Created by: Stock Rover Team

Dogs of the Dow

The ten highest yielding dividend stocks in the Dow Jones 30, otherwise known as the Dogs of the Dow. As of June 12th, 2019.

Created by: Howard Reisman

Drones

Key Drone companies as of January 1st, 2019

Created by: Stock Rover Team

Fidelity iShares ETFs

Fidelity's 70 commission-free iShares ETFs. These include a diverse selection of international, domestic, and specialized equity; fixed income; and commodities. They cover multiple asset classes, including stocks, bonds, commodities, and real estate, and give access to strategies like dividend-producing and minimum volatility funds.

Created by: Stock Rover Team

Fifteen Large REITS

Fifteen of the largest REITs by market cap.

Created by: Howard Reisman

Fin Tech

Key Financial Technology companies as of January 1st, 2019

Created by: Stock Rover Team

Founder Run

Key Founder Run companies as of January 1st, 2019

Created by: Stock Rover Team

Key Indices ETFs

ETFs that represent many of the key indices and markets.

Created by: Stock Rover Team

Mobile Payments

Key Mobile Payment companies as of January 1st, 2019

Created by: Stock Rover Team

Natural Foods

Key Natural Food companies as of January 1st, 2019

Created by: Stock Rover Team

Novy-Marx Quality

These stocks were found with the Novy-Marx Quality screener, which looks for quality stocks as measured by gross profits over total assets, momentum as measured by 1 year price change and value as measured by low price to book ratios. This screener also filters out stocks with very low market caps and trading volumes. These were the top 50 stocks returned when run on June 12th, 2019

Created by: Howard Reisman

Sample Watchlist - The Dow Big 5

The 5 largest stocks in the Dow 30 by market cap

Created by: Howard Reisman

Sector ETFs

ETFs for each of the eleven major sectors.

Created by: Default Watchlist

Small Cap Index Funds

A collection of small cap index ETFs, including microcap, growth, and value funds. Can be used to help see how the small cap market has performed.

Created by: Stock Rover Team

The Big Twenty of MLPs

Twenty of the largest MLPs (Master Limited Partnerships) by market cap.

Created by: Howard Reisman

Tobacco Alcohol and Gambling

Key Tobacco Alcohol and Gambling companies as of January 1st, 2019

Created by: Stock Rover Team

Top 20 S&P 500 Dividend Growers

The top twenty S&P 500 stocks for dividend growth over a 10 year period as of June 12th, 2019.

Created by: Howard Reisman

Top 20 S&P 500 Revenue Growers

The 20 fastest growing S&P 500 companies by revenue growth, looking at a weighted average of the 1 year period through the 10 year period growth rates as of June 12th 2019.

Created by: Howard Reisman

Top 25 ETFs by Market Cap

The Top 25 ETFs by Market Cap as of June 12th, 2019

Created by: Howard Reisman

Top 25 ETFs by Volume

The Top 25 ETFs by trailing three month average daily shares traded as of June 12th, 2019.

Created by: Howard Reisman

Wind Energy

Key Wind Energy companies as of January 1st, 2019

Created by: Stock Rover Team

Library Views

Advanced Valuation

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Analyst Estimates

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Analyst Ratings

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Analyst Revisions

Created by: Howard Reisman

Average Dollar Volume

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Average Volume

Created by: Stock Rover Team

Balance Sheet

Created by: Default View

Balance Sheet Ratios

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Buy Target Price

Created by: Default View

CAN SLIM

Created by: Stock Rover Team

Cash Flow

Created by: Default View

Current Analyst Ratings

Created by: Stock Rover Team

Current Returns

Created by: Default View

Dividend Detail

Created by: Stock Rover Team

Dividend Growth

Created by: Stock Rover Team

Dividend Safety

Created by: Stock Rover Team

Dividends

Created by: Default View

Dividends and Returns

Created by: JN McClellan

ETF & Fund Asset Allocation

Created by: Stock Rover Team

ETF & Fund Equity Capitalization

Created by: Stock Rover Team

ETF & Fund Equity Classification

Created by: Stock Rover Team

ETF & Fund Equity Style Box

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ETF & Fund Profile

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ETF & Fund Region Breakdown

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ETF & Fund Sector Weightings

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Efficiency vs Sector

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Estimates

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Fair Value

Created by: Stock Rover Team

Financial Health

Created by: Default View

Grades

Created by: Default View

Grades & Deciles

Created by: Stock Rover Team

Growth

Created by: Default View

Growth Detail

Created by: Stock Rover Team

Historical Returns

Created by: Stock Rover Team

Historical Valuation

Created by: Stock Rover Team

Income Statement

Created by: Default View

Income Statement Detail

Created by: Stock Rover Team

Industry

Created by: Erica Reisman

Industry Deciles

Created by: Stock Rover Team

Industry Vs Sector Vs S&P 500

Created by: Stock Rover Team

Long Term Growth

Created by: Stock Rover Team

Management

Created by: Stock Rover Team

Momentum

Created by: Default View

Per Share

Created by: Default View

Portfolio Detail

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Portfolio Performance

Created by: Default View

Price

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Profile

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Profile Detail

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Profitability

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Profitability vs

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Red Flag

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Returns

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Returns vs Sector

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Returns vs. Industry

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Returns vs. S&P 500

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Scores

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Sector Deciles

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Small Cap Safety

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Stock Rover Ratings

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Stock Study

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Summary

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Technicals

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Valuation

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Yields

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Library Metric packages

Efficiency

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Receivables

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Valuation

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Yield

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