Contents

Introduction

Welcome to Stock Rover!

As an investor managing significant capital, you know that the challenge is not a lack of data, but the fragmentation and noise that comes with it. **Stock Rover** is designed to solve this by transforming raw financial data into professional-grade, actionable intelligence.

This guide is designed to help you quickly navigate to the insights that matter most. Our goal is to provide a **"Path to Value"** by focusing on the shortcuts and automated features that allow you to master your research with minimal effort.

To get comprehensive help on all of **Stock Rover's** features, please visit our **Help Pages**.

Start Menu

The **Start Menu** is the primary gateway to all Stock Rover features. For a streamlined experience, this guide focuses on **Simple Mode**, which prioritizes the most frequently used tools. To customize the Start Menu to display only the features you use most frequently, select the **hamburger icon** (☰) in the upper left of the Start Menu.

1. **Today's Market** – Your daily command center for real-time market snapshots and automated portfolio summaries.

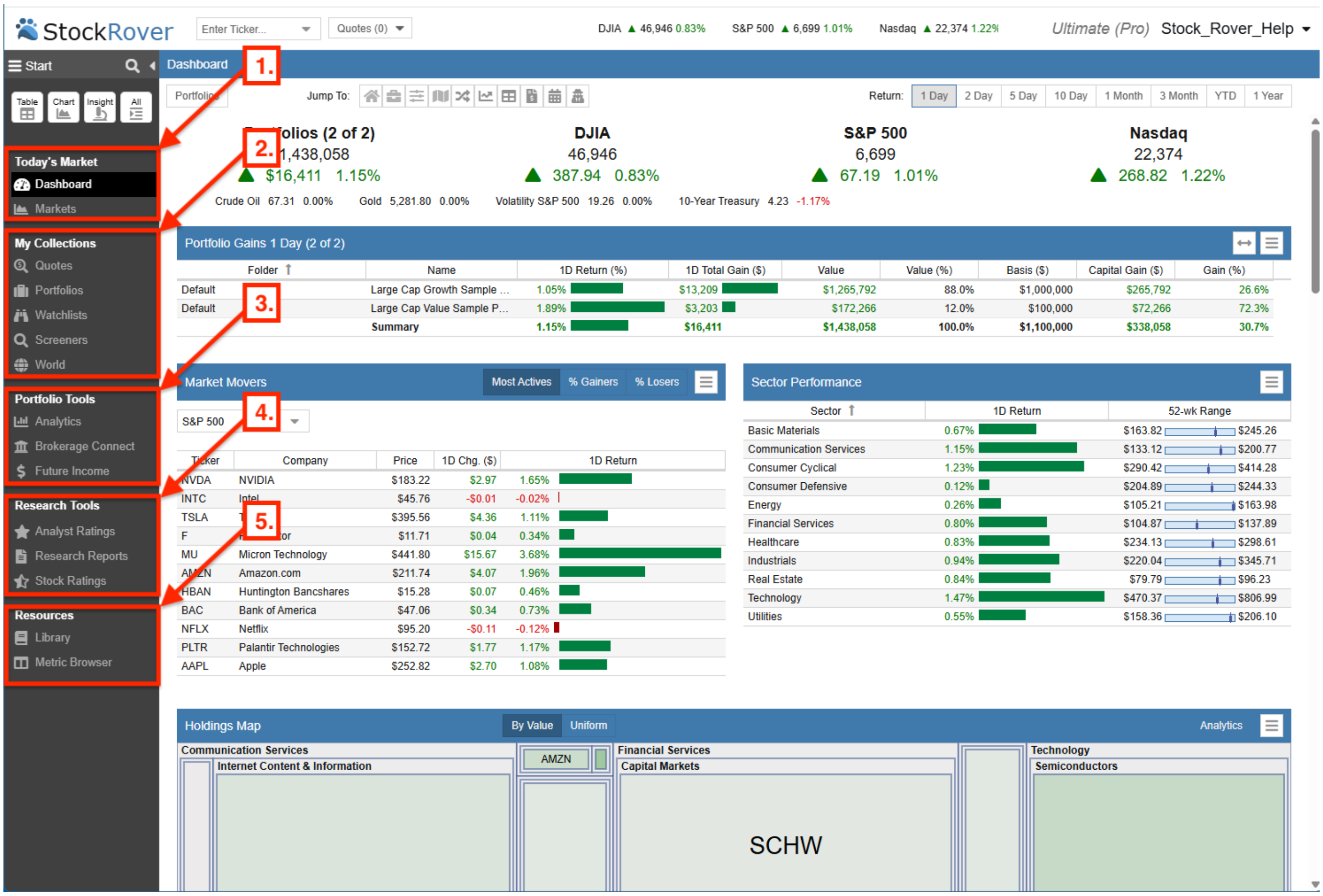
2. **My Collections** – Your primary hub for managing and researching your **Quotes**, **Portfolios**, **Watchlists**, and **Screeners.**

3. **Portfolio Tools** – Professional utilities for assessing investment performance using **Analytics** and establishing secure **Brokerage Connect** feeds.

4. **Research Tools** – Advanced facilities featuring institutional-quality data and comprehensive **Research Reports**.

5. **Resources** – Monitoring and discovery tools, including a **Library** of expert-curated screeners, model portfolios, watchlists, and data views.

163 Bay State Drive · Braintree, MA 02184


StockRover
Enter Ticker...
Quotes (0)
DJIA ▲ 46,946 0.83%
S&P 500 ▲ 6,699 1.01%
Nasdaq ▲ 22,374 1.22%
Ultimate (Pro) Stock_Rover_Help
Start
Dashboard
1.
2.
3.
4.
5.
Today's Market
Dashboard
Markets
My Collections
Quotes
Portfolios
Watchlists
Screeners
World
Portfolio Tools
Analytics
Brokerage Connect
Future Income
Research Tools
Analyst Ratings
Research Reports
Stock Ratings
Resources
Library
Metric Browser
Jump To:
Return: 1 Day 2 Day 5 Day 10 Day 1 Month 3 Month YTD 1 Year
DJIA 46,946 387.94 0.83%
S&P 500 6,699 67.19 1.01%
Nasdaq 22,374 268.82 1.22%
Crude Oil 67.31 0.00%
Gold 5,281.80 0.00%
Volatility S&P 500 19.26 0.00%
10-Year Treasury 4.23 -1.17%
Portfolio Gains 1 Day (2 of 2)
Market Movers
Most Actives % Gainers % Losers
Sector Performance
Holdings Map
By Value Uniform
Analytics
Communication Services
Internet Content & Information
AMZN
Financial Services
Capital Markets
SCHW
Technology
Semiconductors

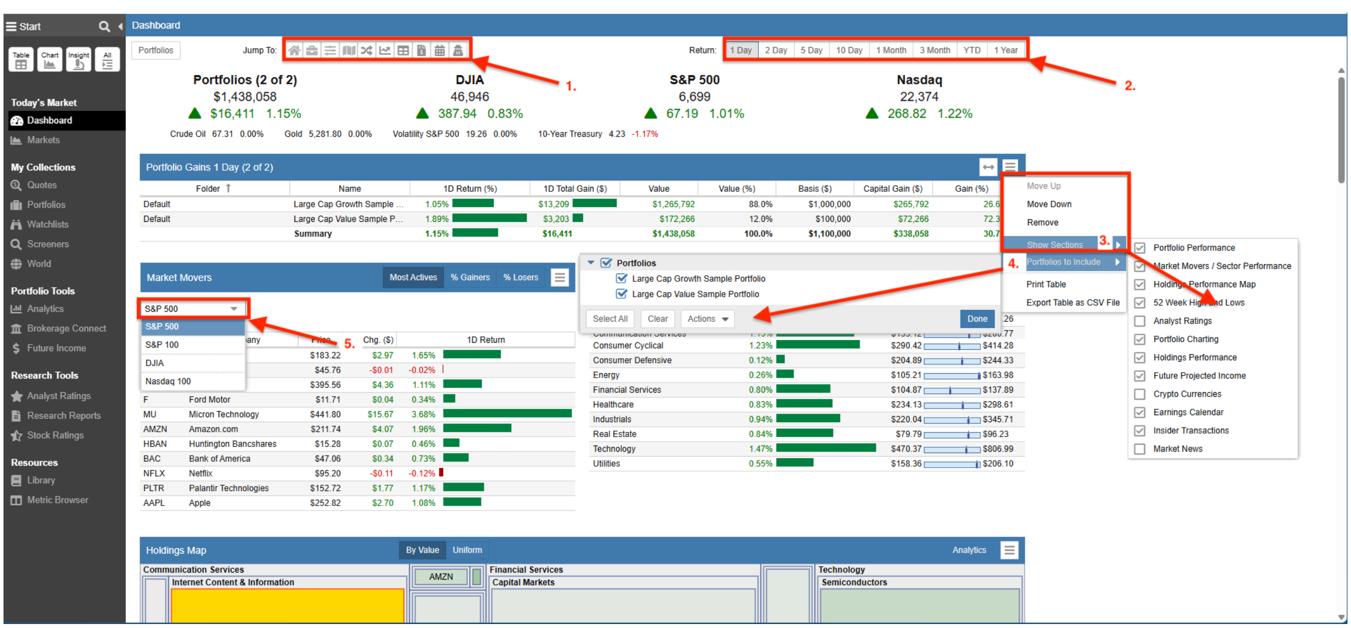
Dashboard

Located at the top of the Start Menu under **Today's Market,** the Dashboard serves as your automated intelligence hub, providing a real-time snapshot of both portfolio performance and the broader market.

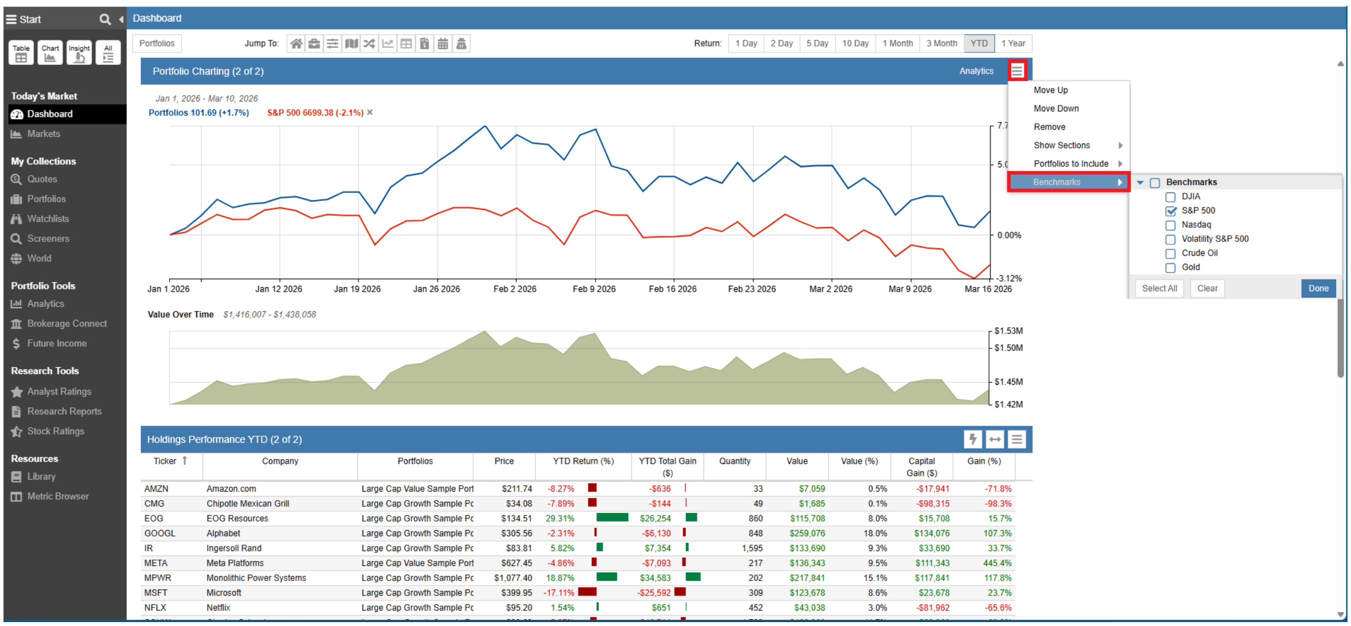
Configuration

The Dashboard is fully customizable, allowing you to prioritize the data most relevant to your investment strategy. For example, you can:

1. **Jump To:** Go directly to a specific section.
2. **Adjust Time Periods:** Change the date selection for performance snapshots of your portfolios and the overall market.
3. **Control Layout:** Reorder, hide, or select specific sections (like Market Overviews or Top Movers) to display.
4. **Target Portfolios:** Select exactly which portfolios to include for evaluation.
5. **Set Market Context:** Choose which index (such as the **S&P 500** or **Nasdaq 100**) drives the Market Movers.



Individual sections within the Dashboard are uniquely configurable to suit your specific research needs. As shown in the example below, clicking the hamburger icon (☰) in the **Portfolio Charting** section opens a configuration menu where you can select additional benchmarks to include on the chart, enabling a clear visual comparison of your portfolio's performance against the broader market.



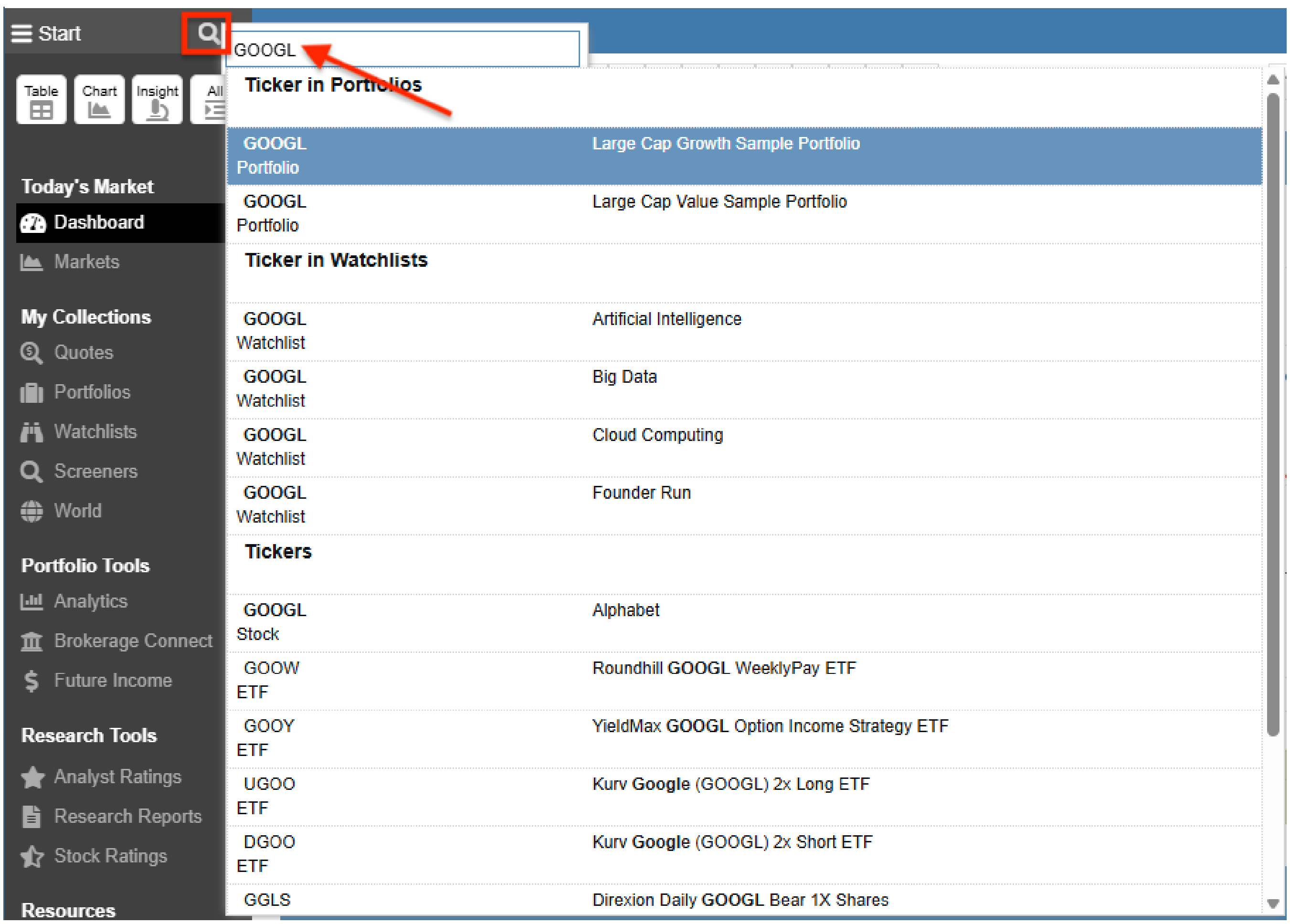
Search

The **[Search Bar](#)** at the top of the Start Menu is your ultimate shortcut. You can type to instantly find:

- **Ticker Search** – Entering a symbol (e.g., **GOOGL**) to show you every watchlist or portfolio where it is held.

- **Metrics** – Access full definitions (e.g., "**Forward P/E**") and also direct links to every "View" where that data is displayed.

- **Navigation** – Jump directly to a Stock Rover tool or function.



Navigation & Layouts

My Collections

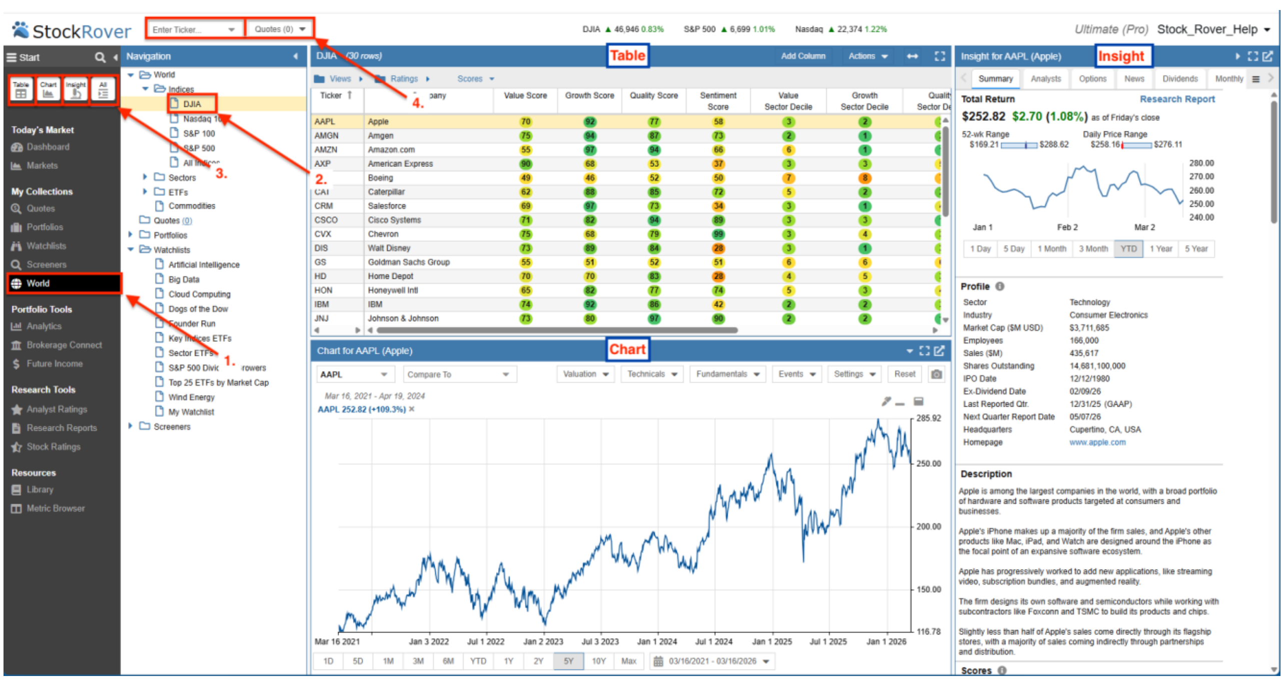
My Collections is your primary workspace for analyzing individual tickers or groups of securities.

1. **Select Your Universe:** Choose the dataset you wish to research from the menu, including your **Portfolios**, **Watchlists**, and **Screeners**, or the **World** section for global indices, sectors, and ETFs.

2. **Navigate the List:** Once a collection is selected, the **Navigation panel** populates with specific groups. For example, selecting **World** allows you to drill down into the **DJIA** or **S&P 500** to view all constituent tickers.

3. **Configure Your Layout:** Use the **Layouts** buttons to customize your workspace. You can toggle between the **Table** for data comparison, the **Chart** for visual trends, and the **Insight Panel** for deep company analysis—or display all three simultaneously for a comprehensive view.

4. **Ad-Hoc Research:** Use the **Enter Ticker** box above the **Navigation panel** to instantly research symbols that aren't currently in your collections. Any tickers entered here are automatically added to your [Quotes](#) list for easy access.



Researching a Portfolio

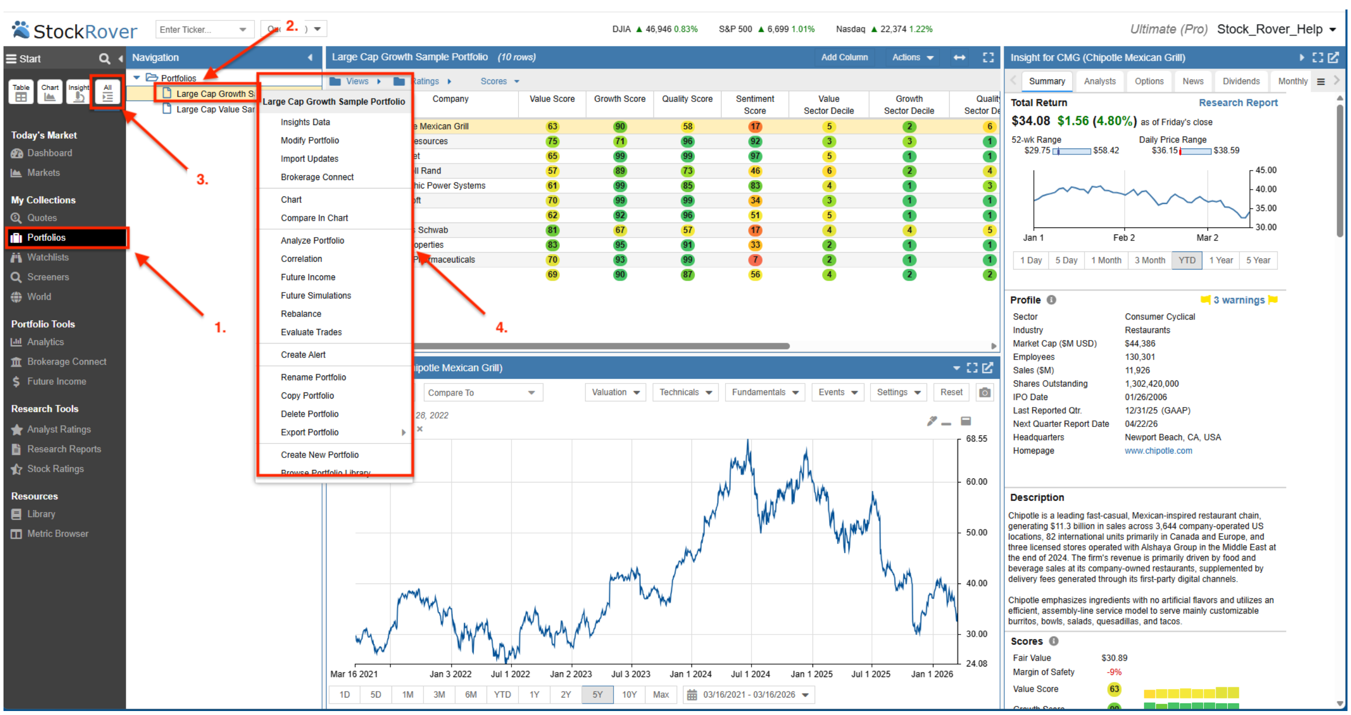
In this example, we are using the **My Collections** area to research the specific tickers that comprise an investment portfolio.

1. **Select Portfolios:** Under the **My Collections** menu, select **Portfolios** to access your personal investment datasets.

2. **Navigation panel:** The panel populates with your available portfolios. In this view, the **Large Cap Growth Sample Portfolio** is selected, which automatically loads its holdings into the research area.

3. **All Layouts:** This toggle tells Stock Rover to display the research results using the **Table**, **Chart**, and **Insight Panel** simultaneously for a comprehensive, multi-perspective view of the portfolio.

4. **Right-Click Menu:** Right-clicking any item in the Navigation panel opens a context-sensitive menu, providing quick access to commonly used tool and functions.



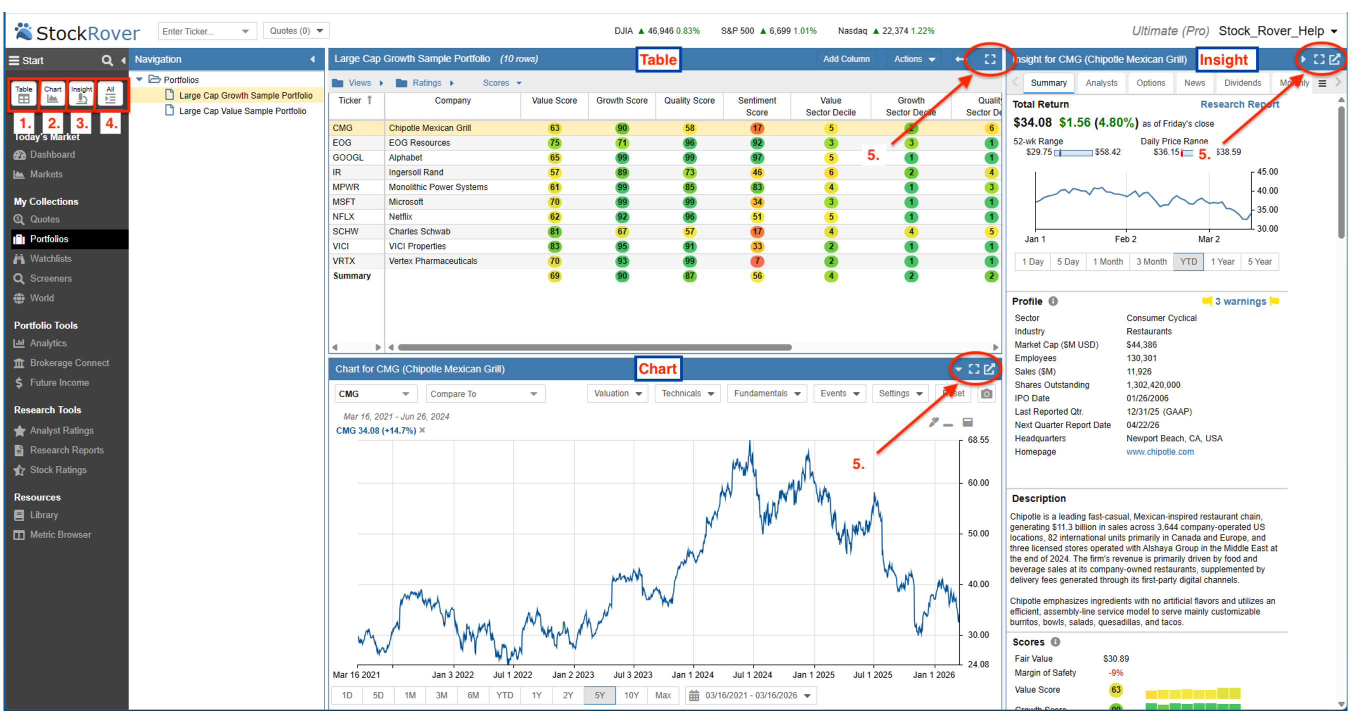
Layouts

Layouts determine how your research results are organized and displayed within Stock Rover. The workspace consists of three primary panels: the **Table**, which provides a flexible, spreadsheet-like view for comparing data; the **Chart**, where you can visualize price, technical indicators, and over 100 fundamental metrics; and the **Insight Panel**, which contains comprehensive tools for in-depth ticker research.

When multiple panels are visible, selecting a ticker in the **Table** automatically updates both the **Chart** and the **Insight Panel** with data for that specific security.

The following layout options are configured via the icons located at the top of the Start Menu:

1. **Table** – Displays only the Table for a data-centric view.
2. **Chart** – Displays only the Chart for a focused visual analysis.
3. **Insight** – Displays only the Insight Panel for deep company research.
4. **All** – Displays the Table, Chart, and Insight Panel together in a single, comprehensive view.
5. **Panel Controls** – Use these icons to collapse, expand, or detach a specific layout into a separate browser window for a multi-monitor setup.



Table

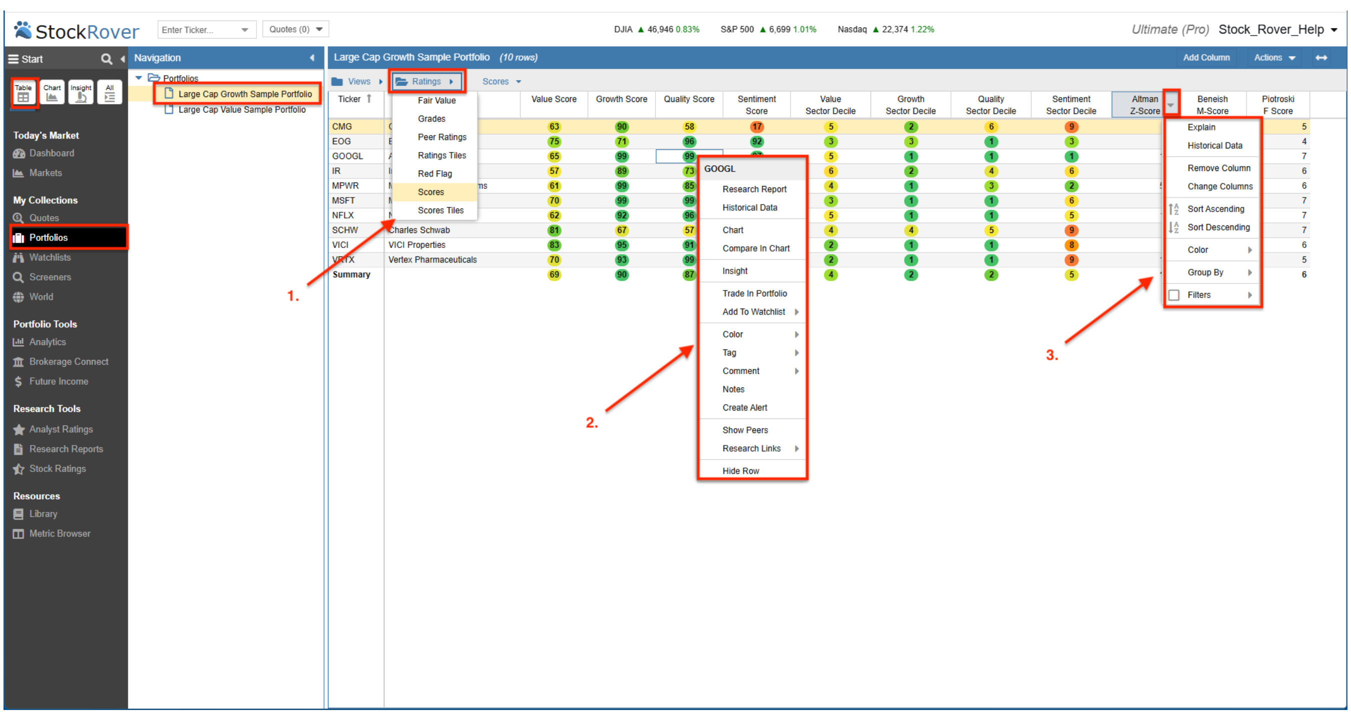
The **Table** is populated based on your selection in the Navigation panel. In this example, the Table rows display the 10 tickers that comprise the “Large Cap Growth Sample Portfolio,” allowing you to compare investment opportunities across multiple dimensions of financial, operational, and price performance. It utilizes a spreadsheet-like paradigm to organize and present specialized financial data efficiently.

The following features allow you to navigate and refine this data:

1. **Views and Folders:** The Table is comprised of **Views**, which are logically organized into folders similar to spreadsheet workbooks. Each View displays a unique set of metrics as columns; here, the “Scores” view from the Ratings folder is selected to prioritize proprietary grading.

2. **Row Options:** You can refine the data display or perform specific ticker actions by right-clicking on any row to access the row-level context menu.

3. **Column Options:** Right-clicking on a column header provides options to sort, filter, or modify the specific metrics being displayed in your current View.



Tile Views

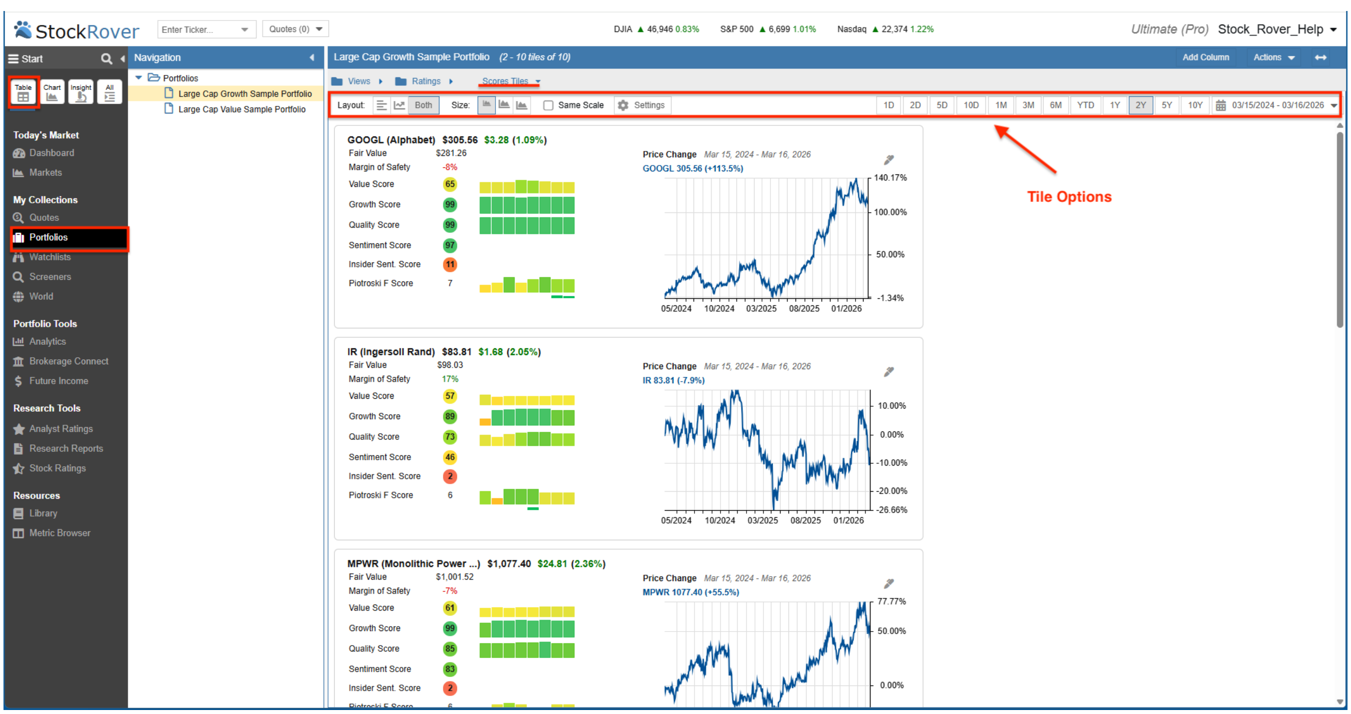
The Table can also be configured to display Tile Views, which present tabular and graphical data together in a card-style format. In this example, the “Scores Tiles” view is selected, displaying both proprietary Scoring metrics and a historical chart for each ticker in your list.

The Tile View toolbar allows you to quickly adjust your workspace through three primary controls:

Layout & Content – Choose whether to display tabular data, chart data, or both, and use the (⚙) Settings menu to customize the specific metrics and data points shown within each individual card.

Sizing & Same Scale – Use the three sizing icons to adjust the horizontal footprint of the charts and toggle Same Scale to standardize the vertical axis across all tickers. This enables a direct visual comparison of relative magnitude and volatility between different tickers.

Timeline – Adjust the historical timeframe to analyze price, fundamental, and technical data.

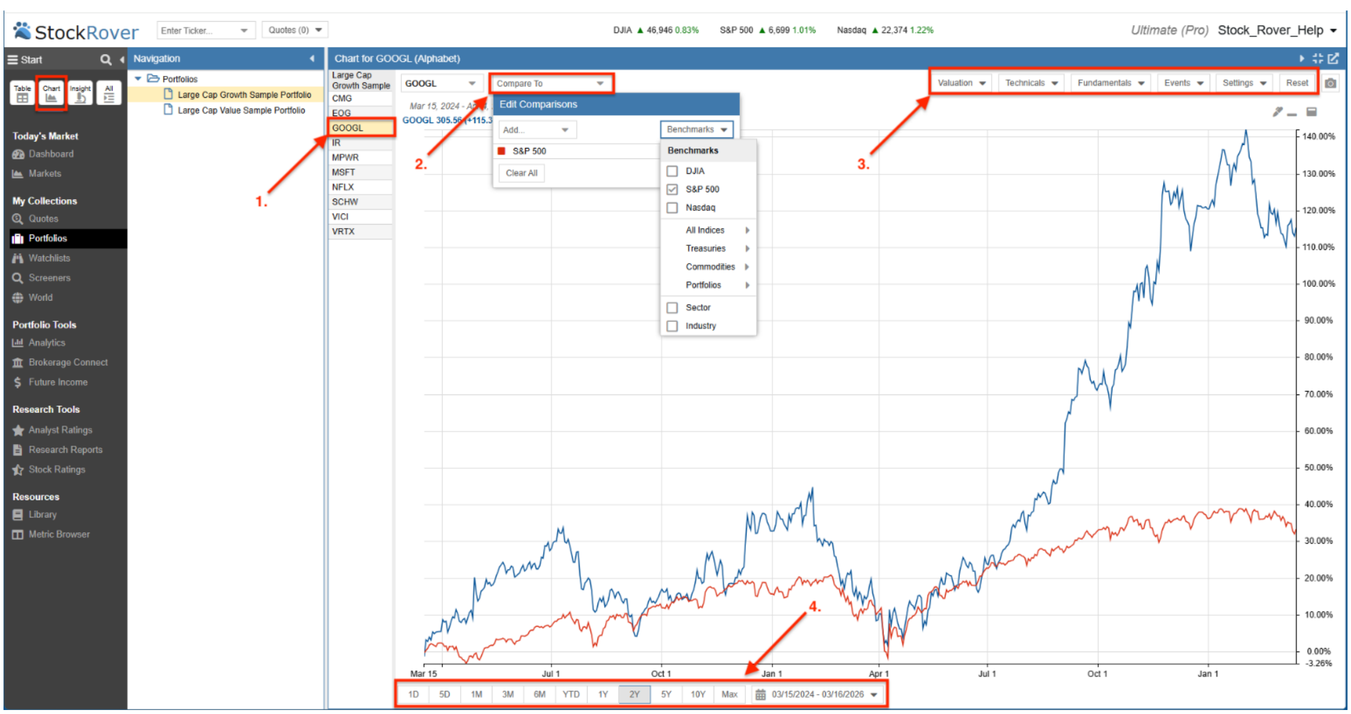


Chart

The [Chart]() gives you a precise way to track price moves and returns, technical indicators, and over 100 fundamental metrics. You can use it to compare how different stocks move against one another or to see the combined performance of entire **Portfolios**, **Screeners**, and **Watchlists**.

The Chart is designed to work dynamically with your research flow:

1. **Table Integration** – Selecting a row in the Table automatically updates the Chart with that ticker's data. For example, selecting **GOOGL** from the Table immediately shows its historical performance here.
2. **Comparative Analysis** – You can add more tickers or benchmarks to the current chart. This makes it easy to see how a stock is performing compared to its peers or the broader market.
3. **Custom Configuration** – Use the configuration menus to pick exactly what you want to see, including technical indicators, fundamental data points, and major corporate events.
4. **Timeline Controls** – Choose from standard date ranges or enter a custom range to focus on a specific period in the market.

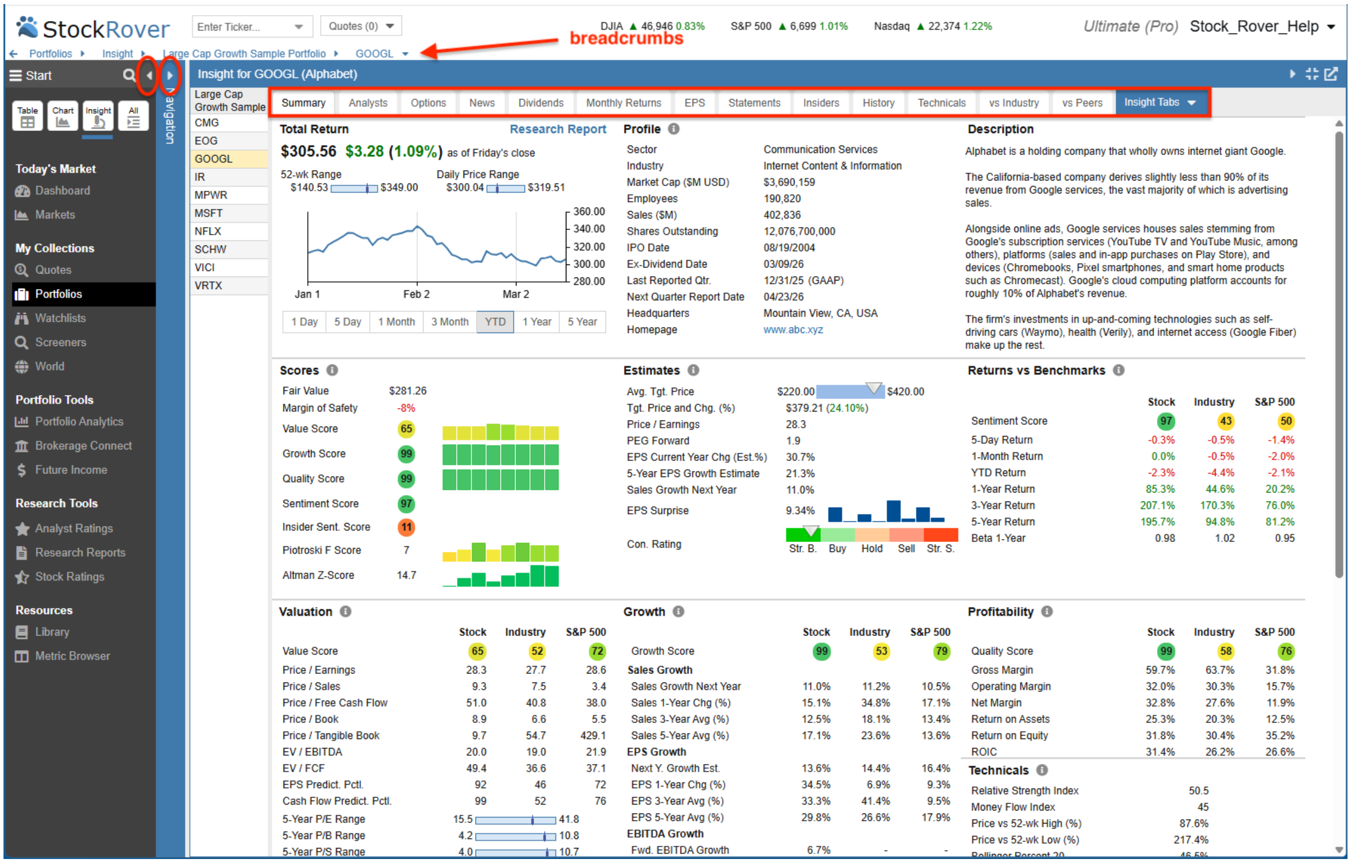


Insight Panel

The **Insight Panel** serves as your primary research hub for deep-dive analysis on a specific security. Selecting a ticker in the Table (e.g., **GOOGL**) instantly synchronizes the Insight Panel with that company's data. To maximize your workspace, you can collapse the Start Menu and Navigation panel as shown in the example below.

The Insight Panel is organized into 13 specialized tabs:

1. **Summary** – Provides a detailed snapshot of key company information and metrics.
2. **Analysts** – Displays current analyst ratings, price targets, and future earnings estimates.
3. **Options** – Shows the full options chain for the selected ticker.
4. **News** – Aggregates the latest headlines and updates relevant to the company.
5. **Dividends** – Details the company's dividend yield and payment history.
6. **Monthly Returns** – Highlights historical seasonality trends for a stock, ETF, or fund.
7. **EPS** – Tracks sales, earnings per share, and cash flow trends over time.
8. **Statements** – Contains detailed financials, including income statements, balance sheets, and cash flow statements.
9. **Insiders** – Tracks company ownership by detailing recent buying and selling activity by officers and directors.
10. **History** – Summarizes the company's past financial and price performance.
11. **Technicals** – Displays key technical indicators and momentum signals.
12. **vs Peers** – Offers a side-by-side comparison against direct competitors.
13. **vs Industry** – Presents metrics comparing the stock to its industry peers and the S&P 500.


StockRover
Enter Ticker...
Quotes (0)
DJIA ▲ 46,946 0.83%
S&P 500 ▲ 6,699 1.01%
Nasdaq ▲ 22,374 1.22%
Ultimate (Pro)
Stock_Rover_Help
Portfolios
Insight
Large Cap Growth Sample Portfolio
GOOGL
breadcrumbs
Start
Insight for GOOGL (Alphabet)
Table
Chart
Insight
All
Navigation
Large Cap Growth Sample
CMG
EOG
GOOGL
IR
MPWR
MSFT
NFLX
SCHW
VICI
VRTX
Today's Market
Dashboard
Markets
My Collections
Quotes
Portfolios
Watchlists
Screeners
World
Portfolio Tools
Portfolio Analytics
Brokerage Connect
Future Income
Research Tools
Analyst Ratings
Research Reports
Stock Ratings
Resources
Library
Metric Browser
Summary
Analysts
Options
News
Dividends
Monthly Returns
EPS
Statements
Insiders
History
Technicals
vs Industry
vs Peers
Insight Tabs
Total Return
Research Report
$305.56 $3.28 (1.09%) as of Friday's close
52-wk Range
$140.53
$349.00
Daily Price Range
$300.04
$319.51
360.00
340.00
320.00
300.00
280.00
Jan 1
Feb 2
Mar 2
1 Day
5 Day
1 Month
3 Month
YTD
1 Year
5 Year
Profile
Sector
Communication Services
Industry
Internet Content & Information
Market Cap ($M USD)
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Employees
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Sales ($M)
402,836
Shares Outstanding
12,076,700,000
IPO Date
08/19/2004
Ex-Dividend Date
03/09/26
Last Reported Qtr.
12/31/25 (GAAP)
Next Quarter Report Date
04/23/26
Headquarters
Mountain View, CA, USA
Homepage
www.abc.xyz
Description
Alphabet is a holding company that wholly owns internet giant Google.
The California-based company derives slightly less than 90% of its revenue from Google services, the vast majority of which is advertising sales.
Alongside online ads, Google services houses sales stemming from Google's subscription services (YouTube TV and YouTube Music, among others), platforms (sales and in-app purchases on Play Store), and devices (Chromebooks, Pixel smartphones, and smart home products such as Chromecast). Google's cloud computing platform accounts for roughly 10% of Alphabet's revenue.
The firm's investments in up-and-coming technologies such as self-driving cars (Waymo), health (Verily), and internet access (Google Fiber) make up the rest.
Scores
Fair Value $281.26
Margin of Safety -8%
Value Score 65
Growth Score 99
Quality Score 99
Sentiment Score 97
Insider Sent. Score 11
Piotroski F Score 7
Altman Z-Score 14.7
Estimates
Avg. Tgt. Price $220.00 $420.00
Tgt. Price and Chg. (%) $379.21 (24.10%)
Price / Earnings 28.3
PEG Forward 1.9
EPS Current Year Chg (Est.%) 30.7%
5-Year EPS Growth Estimate 21.3%
Sales Growth Next Year 11.0%
EPS Surprise 9.34%
Con. Rating
Str. B.
Buy
Hold
Sell
Str. S.
Returns vs Benchmarks
Stock Industry S&P 500
Sentiment Score 97 43 50
5-Day Return -0.3% -0.5% -1.4%
1-Month Return 0.0% -0.5% -2.0%
YTD Return -2.3% -4.4% -2.1%
1-Year Return 85.3% 44.6% 20.2%
3-Year Return 207.1% 170.3% 76.0%
5-Year Return 195.7% 94.8% 81.2%
Beta 1-Year 0.98 1.02 0.95
Valuation
Stock Industry S&P 500
Value Score 65 52 72
Price / Earnings 28.3 27.7 28.6
Price / Sales 9.3 7.5 3.4
Price / Free Cash Flow 51.0 40.8 38.0
Price / Book 8.9 6.6 5.5
Price / Tangible Book 9.7 54.7 429.1
EV / EBITDA 20.0 19.0 21.9
EV / FCF 49.4 36.6 37.1
EPS Predict. Pctl. 92 46 72
Cash Flow Predict. Pctl. 99 52 76
5-Year P/E Range 15.5 41.8
5-Year P/B Range 4.2 10.8
5-Year P/S Range 4.0 10.7
Growth
Stock Industry S&P 500
Growth Score 99 53 79
Sales Growth
Sales Growth Next Year 11.0% 11.2% 10.5%
Sales 1-Year Chg (%) 15.1% 34.8% 17.1%
Sales 3-Year Avg (%) 12.5% 18.1% 13.4%
Sales 5-Year Avg (%) 17.1% 23.6% 13.6%
EPS Growth
Next Y. Growth Est. 13.6% 14.4% 16.4%
EPS 1-Year Chg (%) 34.5% 6.9% 9.3%
EPS 3-Year Avg (%) 33.3% 41.4% 9.5%
EPS 5-Year Avg (%) 29.8% 26.6% 17.9%
EBITDA Growth
Fwd. EBITDA Growth 6.7% - -
Profitability
Stock Industry S&P 500
Quality Score 99 58 76
Gross Margin 59.7% 63.7% 31.8%
Operating Margin 32.0% 30.3% 15.7%
Net Margin 32.8% 27.6% 11.9%
Return on Assets 25.3% 20.3% 12.5%
Return on Equity 31.8% 30.4% 35.2%
ROIC 31.4% 26.2% 26.6%
Technicals
Relative Strength Index 50.5
Money Flow Index 45
Price vs 52-wk High (%) 87.6%
Price vs 52-wk Low (%) 217.4%

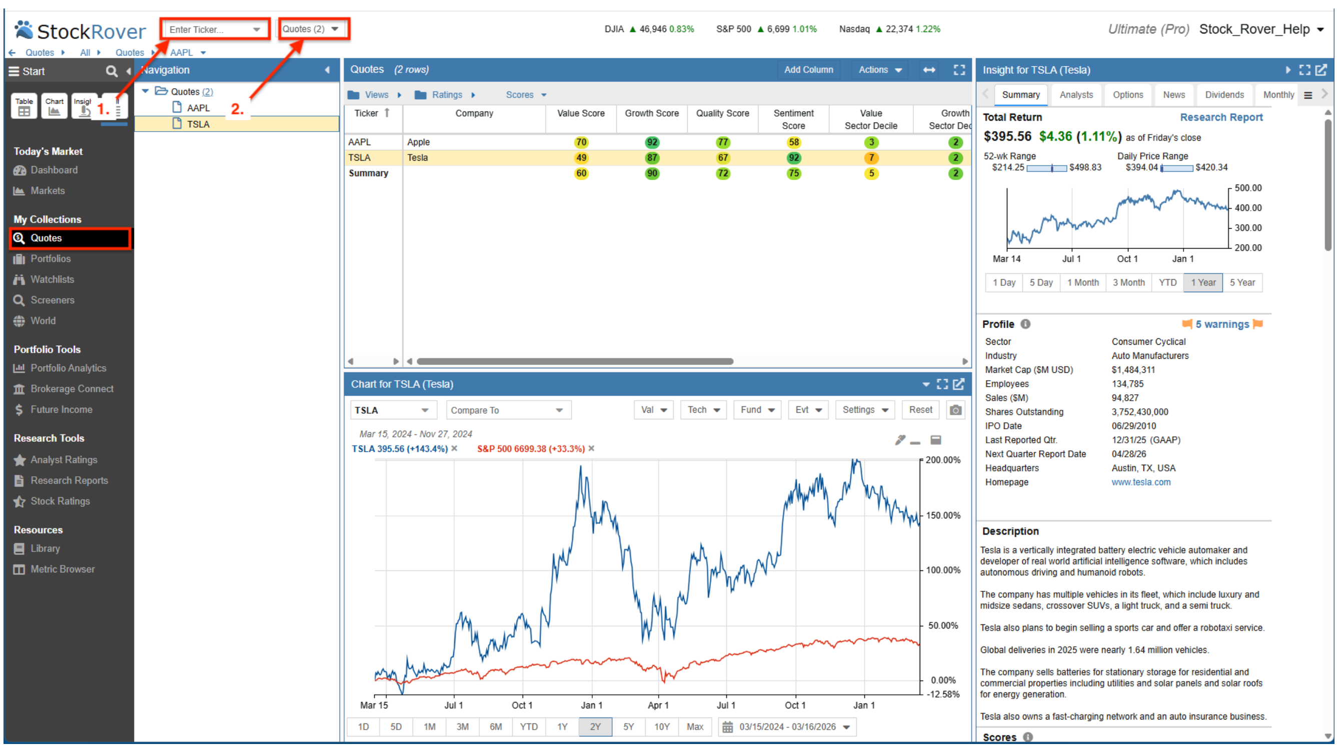
Quotes

[Quotes](#) is a dedicated space for managing your Quote List—a collection of tickers you want to explore without officially adding them to a watchlist or portfolio. It serves as a staging area for short-term research and ad-hoc analysis.

You can add tickers using the **Enter Ticker** box and access your full list at any time via the **Quotes** option under **My Collections**.

1. **Enter Ticker** – When you type a symbol here, it is instantly added to both your active **Quotes** list and the **Table** for immediate research.

2. **Quotes Management** – Selecting this option allows you to organize your list, including the ability to restore recently deleted tickers if you need to revisit a previous idea.



Pro Tip: *Think of Quotes as a scratchpad. If you decide you want to track a ticker long-term, right-click the ticker in the Table and select 'Add To Watchlist' to save it permanently.*

Managing Portfolios, Watchlists, and Screeners

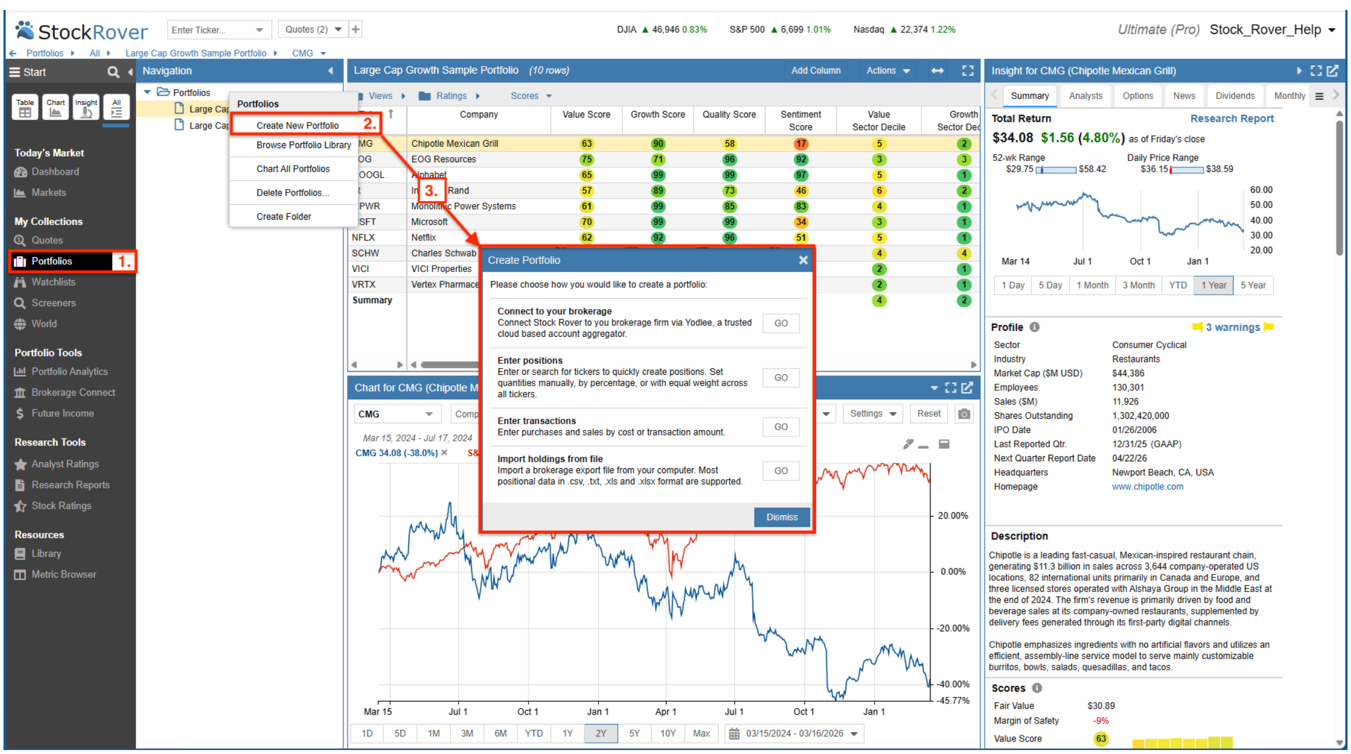
You can easily create, modify, or delete your Portfolios, Watchlists, and Screeners to keep your research organized. Management functions are centralized in the Navigation panel and are accessed via a simple right-click.

For example, to create a portfolio:

1. **Select Category** – Click on **Portfolios** in the Start Menu to display your current collections in the Navigation panel.

2. **Initiate Creation** – Right-click on **Portfolios** in the Navigation panel and select **Create New Portfolio**.

3. **Choose Method** – Once selected, you can choose the specific method you would like to use to create your portfolio, such as connecting to a brokerage, manual entry, or importing a file.



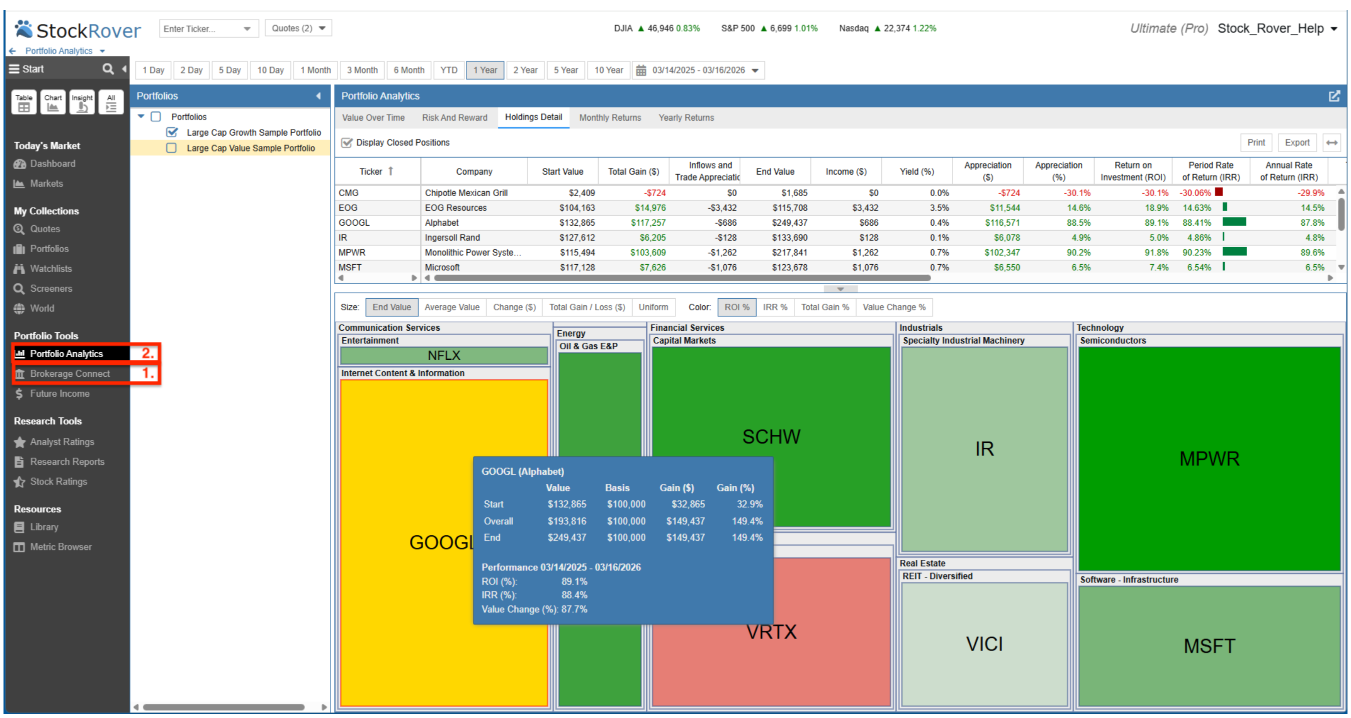
Tracking Portfolio Performance

Overview

Stock Rover provides a comprehensive set of tools to manage and track your portfolios effectively. When the **Start Menu** is in "**[Simple Mode](#)**" mode, it highlights two core functionalities:

1. **[Brokerage Connect](#)** – Configure Stock Rover to connect directly to your brokerage firm(s).

2. **[Portfolio Analytics](#)** – Analyze the performance of your portfolios over any timeframe.



Brokerage Connect

To analyze portfolio performance, you first need to import your portfolio details into Stock Rover. The quickest way to accomplish this is by linking a Stock Rover portfolio to your actual holdings via **Brokerage Connect**.

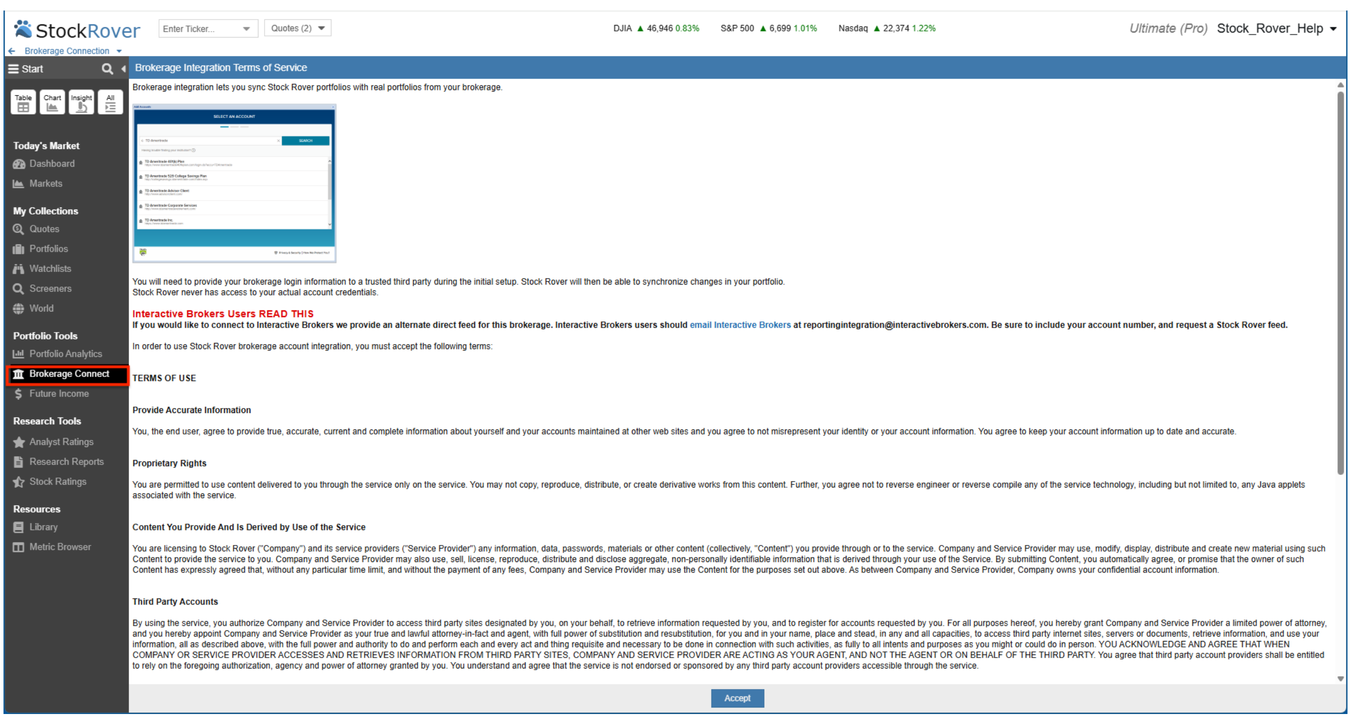
Note: If you prefer not to use Brokerage Connect, or if your brokerage is not supported, you can always opt to maintain a manual portfolio.

When you connect via **Brokerage Connect**, a read-only data feed is established to your brokerage firm(s) via **Yodlee**, a trusted cloud-based account aggregator.

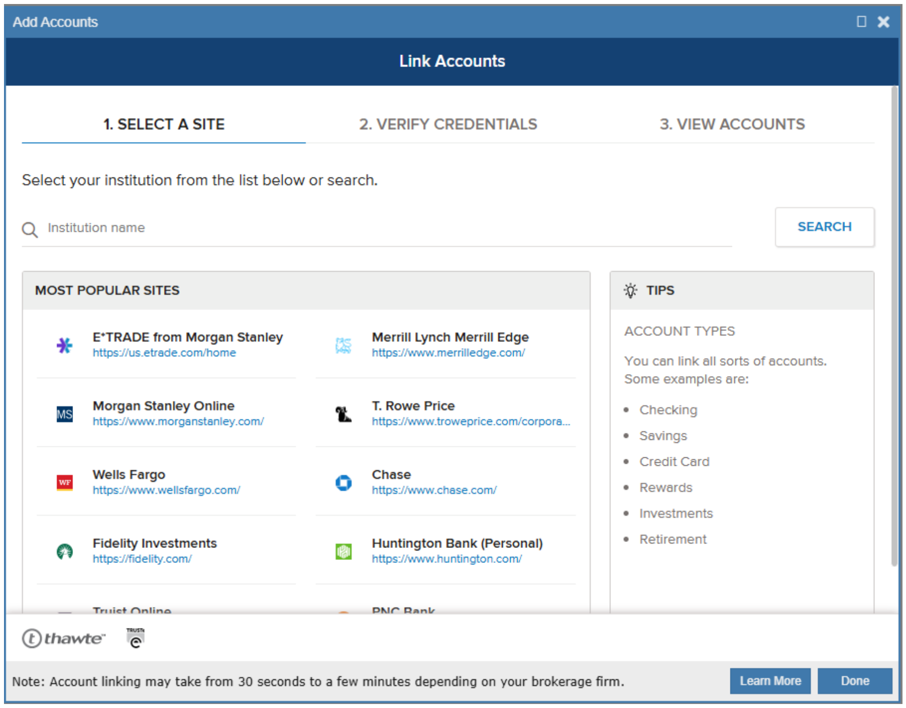
1. **Synchronization:** The details for each portfolio are synchronized automatically. In addition to being updated nightly, an update is initiated whenever you log in.

2. **Interactive Brokers Users:** If you are an Interactive Brokers user, click here for specific connection instructions.

3. **Setup:** When you select **Brokerage Connect** from the Start Menu, you will first be presented with the Terms of Service.



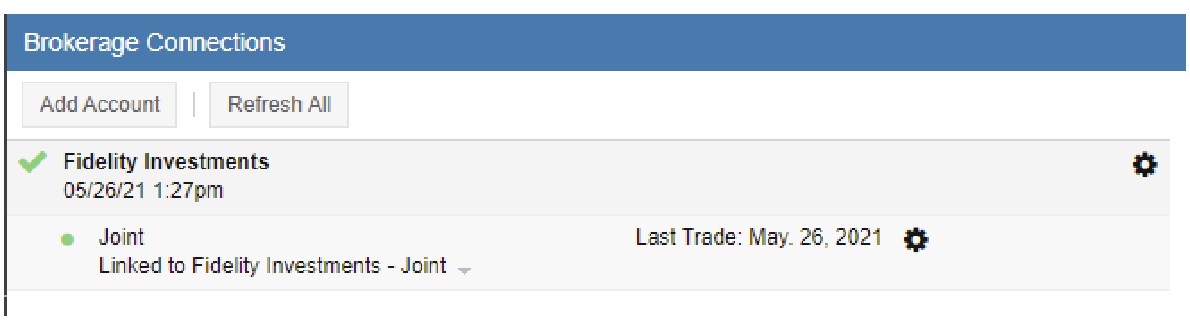
After accepting the Terms of Service, you'll be connected to the **Yodlee** interface, where you'll be able to search for your brokerage account.



You'll follow the prompts to enter your account login information. Once the connection has been verified, you'll see the **Brokerage Connections panel** in Stock Rover.

By default, the portfolios that appear in the **Brokerage Connections panel** will be linked to a Stock Rover portfolio with the legal name of the portfolio as it appears in the brokerage account.

Below is an example of a brokerage account connection with a single portfolio.



Portfolio Analytics

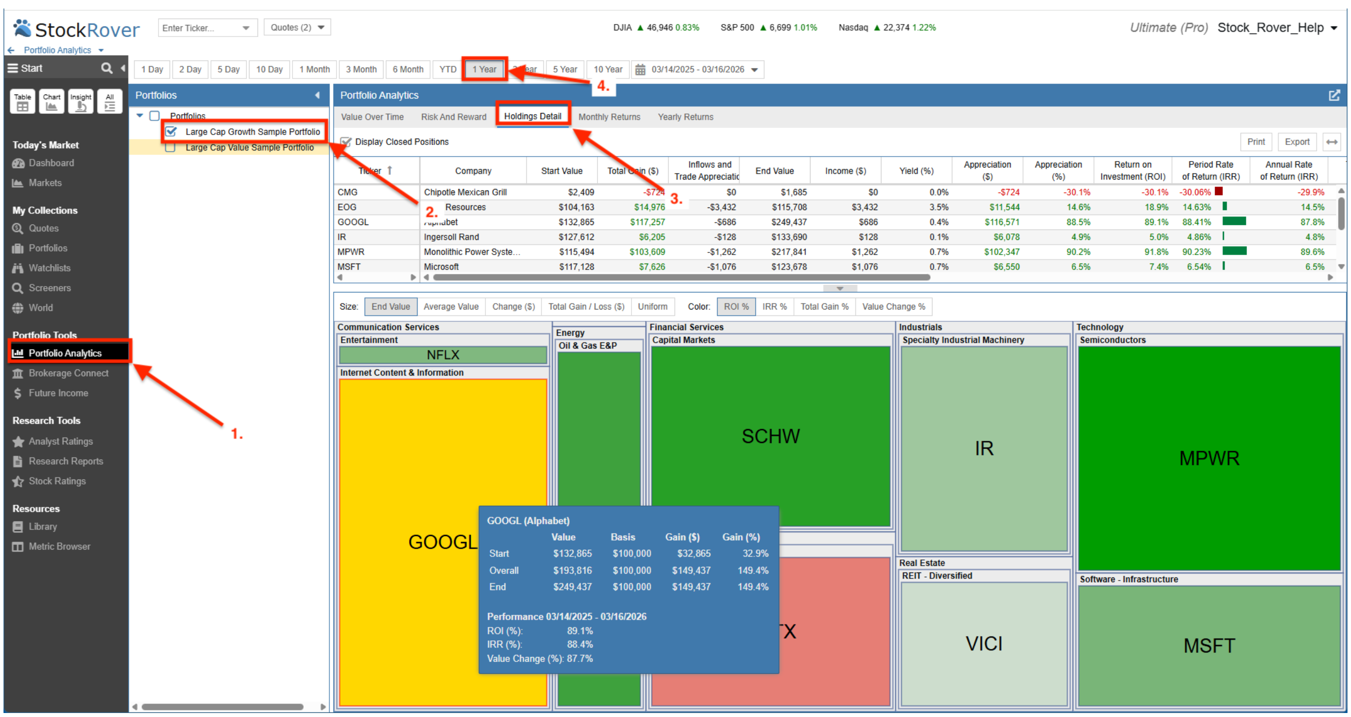
The **[Portfolio Analytics](#)** tool provides a deep-dive analysis of your performance and individual holdings. It works for both portfolios linked via **Brokerage Connect** and those maintained manually.

1. **Open Analytics** – Select **Portfolio Analytics** from the **Portfolio Tools** section of the **Start Menu**.

2. **Pick Portfolios** – Select the portfolio (or group of portfolios) you wish to analyze from the **Navigation panel**.

3. **Select Report Tab** – Choose one of the five tabs at the top to switch between different analytical views.

4. **Set Date Range** – Enter a specific timeframe to focus the report on a particular historical period.



Research Tools

Overview

The **Research Tools** suite provides in-depth analysis on individual companies, offering everything from institutional-grade reports to sentiment from Wall Street analysts and company insiders. This suite includes **Analyst Ratings**, **Insider Transactions**, and proprietary **Stock Ratings**.

Featured: Research Reports

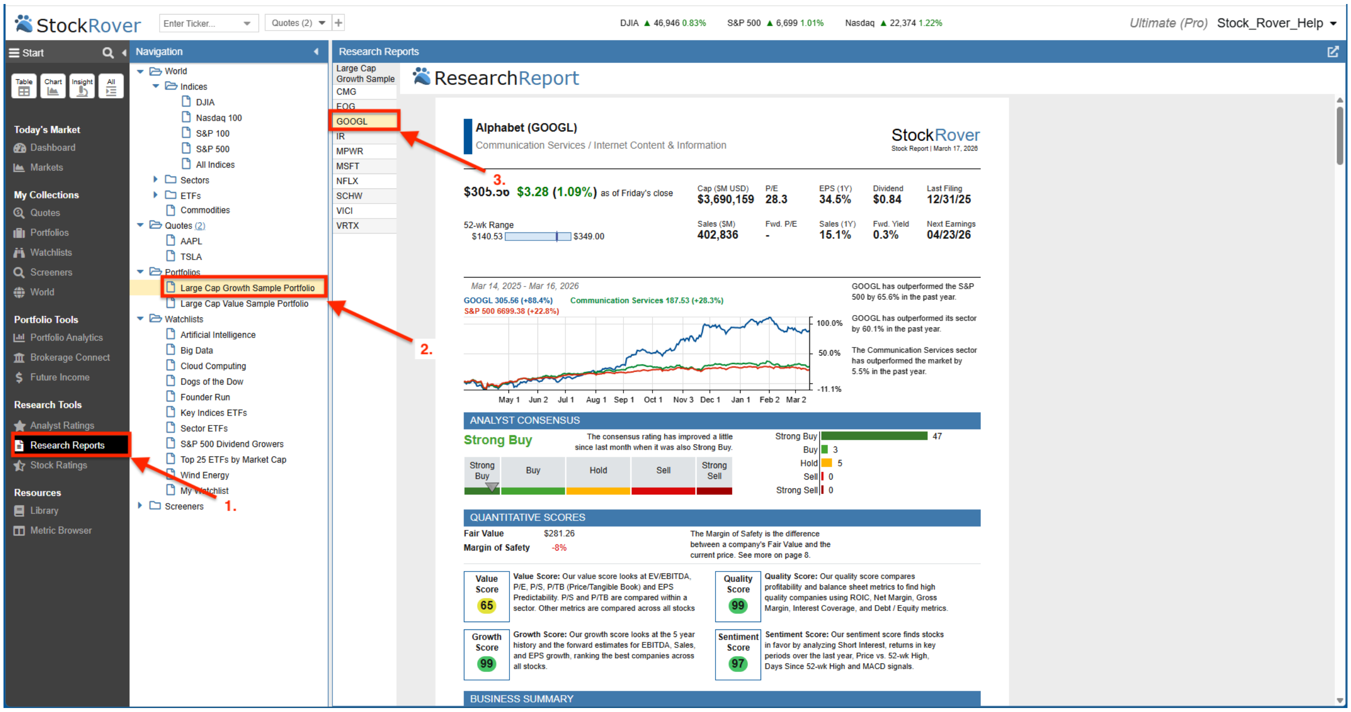
Each **Research Report** offers a real-time, 8-page analysis of a company's financial health and industry standing. Because these are generated on demand for over 14,000 stocks, they always utilize the most current data available. You can view reports directly in your browser or download them as a **PDF** for easy sharing and portability.

To generate a report:

1. **Open Research Reports** – Select **Research Reports** from the **Start Menu**.

2. **Choose Data Set** – Select a portfolio, watchlist, or index from the **Navigation panel** to load a list of tickers.

3. **Generate Report** – Click on a specific ticker to instantly produce its full 8-page analysis.



Resources

Overview

The **Resources** group centralizes tools for automating market monitoring and discovering new investment ideas. This includes real-time **Alerts**, an **Ideas** panel that provides investment inspiration through a "Screener of the Week" and various proven themes, a comprehensive **Earnings Calendar**, and a **Metric Browser** with definitions for over 800 metrics.

Featured: The Library

The **Library** is a collection of pre-built research resources that you can import directly into your account. It features a wide variety of expert-curated **screeners, model portfolios**, **watchlists**, and **data views** designed to jumpstart your analysis.

In the example below, we are searching the Library for **Dividend Screeners**:

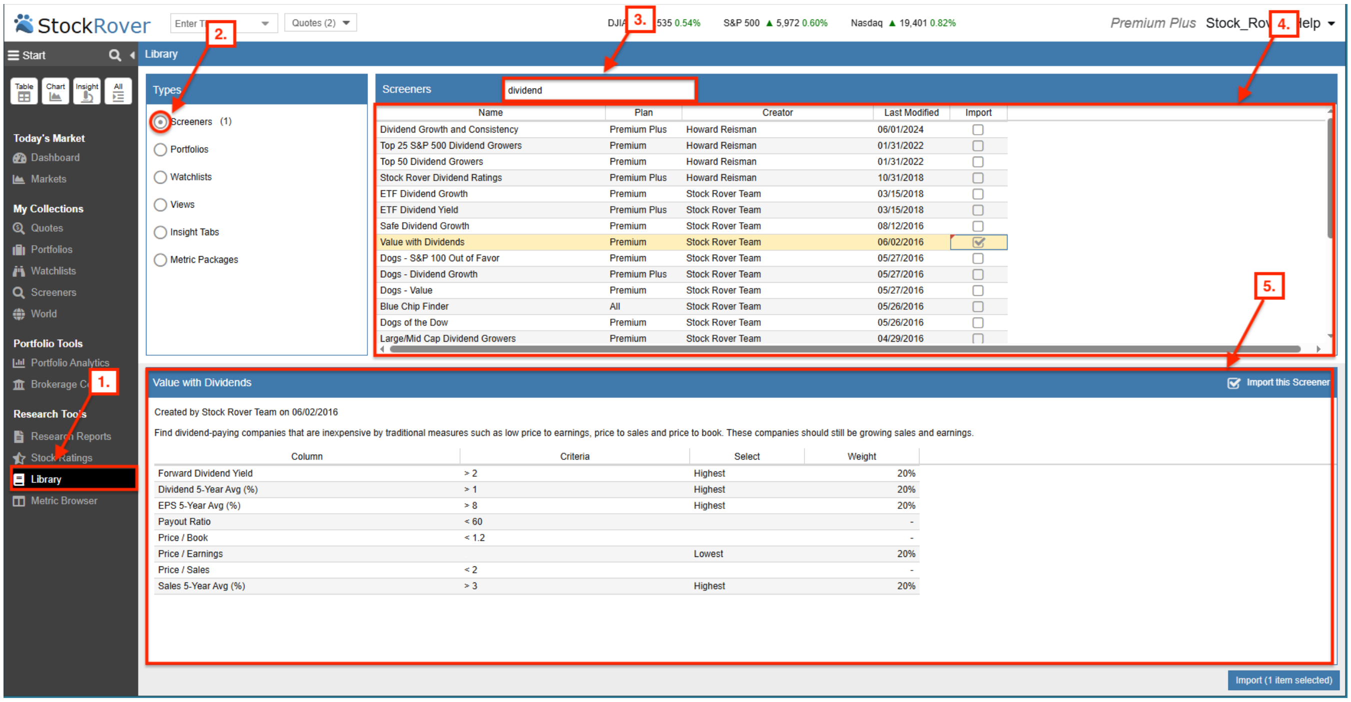
1. **Open Library** – Select **Library** from the **Start Menu**.

2. **Choose Category** – Select the type of resource you wish to browse (e.g., **Screeners**).

3. **Search** – Enter a keyword like "**dividend**" in the search box to filter the collection.

4. **Browse Results** – Review the list of matching screeners returned in the pane.

5. **Preview & Import** – Select a specific screener to view its full description and criteria before importing it into your account.



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Import this Screener
Created by Stock Rover Team on 06/02/2016
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.
Column
Criteria
Select
Weight
Forward Dividend Yield
Dividend 5-Year Avg (%)
EPS 5-Year Avg (%)
Payout Ratio
Price / Book
Price / Earnings
Price / Sales
Sales 5-Year Avg (%)
Import (1 item selected)