

# Power Stock Searches with MyStockProspector.com



by Doug Gerlach  
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January 2017

## For Technical Problems

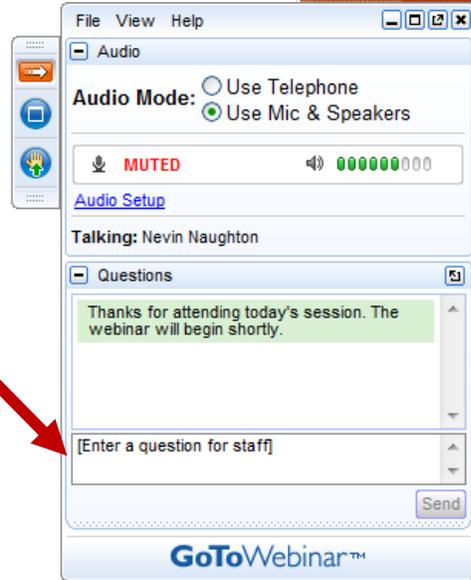
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## Have "Question?"

You don't need  
microphone.

We'll answer  
questions during  
presentation & at  
end.

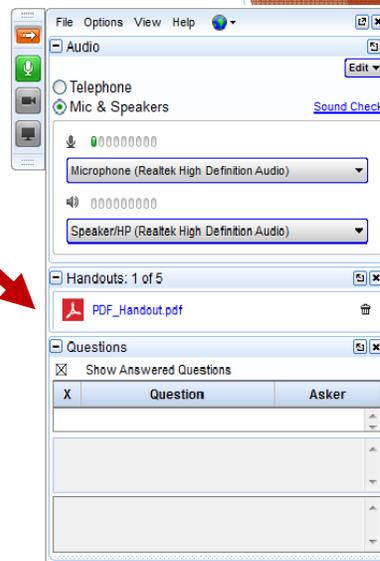


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## Download Handout

Handout in  
PDF format is  
available in  
Handouts tab.

(Click to expand  
if necessary.)



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## Power Stock Searches with MyStockProspector.com



## What Is Stock Screening?



## Stock Screening Is:

- ▶ Using computerized database to find stocks that meet particular criteria.
- ▶ Exceptionally useful in finding ideas to:
  - ▶ Meet minimum requirements of growth, quality, valuation.
  - ▶ Improve portfolio diversification.
    - ▶ By company size, market cap, sector, industry.



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## About MyStockProspector.com

- ▶ Internet's only screener dedicated to fundamental analysis.
- ▶ Data updated weekly from Morningstar.
  - ▶ Same data used in StockCentral & other ICLUBcentral & BetterInvesting tools.
- ▶ 120 criteria for screens & reports.
  - ▶ See complete list & definitions in Help section.
- ▶ Developed by ICLUBcentral Inc.
- ▶ \$49.99 per year (regularly \$79.99).
  - ▶ 1-, 3-, & 6-month subscriptions available.
  - ▶ Free demo available.
  - ▶ [www.MyStockProspector.com](http://www.MyStockProspector.com)



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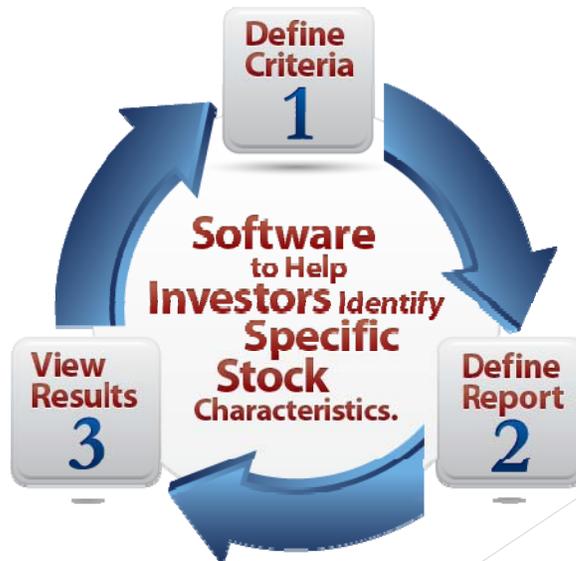
## Other Uses

- ▶ Use as “data miner.”
- ▶ Plumb database for data on stocks in watch list or current portfolio.
- ▶ Create custom reports on stocks with always-current data.
- ▶ Export data to spreadsheet for still further manipulation.
- ▶ Review industry averages.



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## Three-Part Screening Process



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## Screening for Beginners



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## Using Pre-Defined Screens

- ▶ MyStockProspector includes collection of pre-defined screens.
- ▶ Just click and go!



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Home | Define Criteria | Define Report | View Results | My Saved Screens | **Pre-Defined Screens** | Help

Pre-Defined Screens

Show 10 entries

Name	Description	Action
BetterInvesting 1	Companies with consistent 10-year revenue and EPS growth rates greater than 15%, with stable pre-tax profit margins and returns on equity, and selling below their historical average P/E ratios.	[Action]
BetterInvesting 2	Companies with historical and projected 5-year EPS growth rates greater than 15%, currently selling at P/E Ratios below their historical EPS growth rates, and with projected total return greater than 15%.	[Action]
Growth Companies	Companies with consistent historical 5-year EPS and revenue growth rates and projected EPS growth rates greater than 15%, currently selling at P/E Ratios below their average historical P/E Ratios.	[Action]
ICLUB Growth	Companies that are growing EPS and revenues faster than their industry averages over the past 1-, 3-, and 5-year periods, and that are of acceptable or desirable quality.	[Action]
Quality companies	Companies with very consistent 5-year EPS growth and 10-year EPS growth rates greater than 10%, with stable pre-tax profit margins and returns on equity.	[Action]
Safety companies	Companies with betas below 1.0, market caps greater than \$3 billion, historical dividend growth greater than 15%, and 10-year historical EPS and revenue growth greater than 15%.	[Action]
Value companies	Companies with consistent 10-year revenue and EPS growth rates greater than 15%, selling below their historical average P/E ratios and with at P/E Ratios below their	[Action]

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Current Screen

Click on column header to sort ascending/descending

Show 25 entries

Symbol	Company Name	Industry	Sales	Proj 1 Yr EPS Gr	Proj 5 Yr EPS Gr	1Yr Proj EPS	5Yr Proj EPS	Quality Rating
BIDU	Baidu Inc	Internet Content & Information	10,561.93	20.0	7.9	15.139	20.520	6.0
BOFI	Boji Holding Inc	Savings & Cooperative Banks	327.35	20.0	10.0	1.850	2.709	6.0
CACC	Credit Acceptance Corp	Credit Services	825.30	9.8	9.8	17.348	25.216	6.0
CCL.A.TO	CCL Industries Inc	Packaging & Containers	3,039.11	9.2	9.2	8.380	11.916	6.0
CCL.B.TO	CCL Industries Inc	Packaging & Containers	3,039.11	9.2	9.2	8.380	11.916	6.0
CMD	Cantel Medical Corp	Medical Instruments & Supplies	664.76	13.1	13.1	1.440	2.356	6.0
DOL.TO	Dollarama Inc	Discount Stores	2,650.33	12.6	12.6	3.000	4.823	6.0
DY	Dycom Industries Inc	Engineering & Construction	2,672.54	9.4	7.0	3.890	5.099	6.0
EGBN	Eagle Bancorp Inc	Banks - Regional - US	260.57	18.0	18.0	3.269	6.337	6.0
HEI	Heico Corp	Aerospace & Defense	1,376.26	9.9	12.5	2.290	3.668	6.0
HEIA	Heico Corp	Aerospace & Defense	1,376.26	9.9	12.5	2.290	3.668	6.0
LAD	Lithia Motors Inc	Auto & Truck Dealerships	7,864.25	10.8	4.2	6.910	8.146	5.0
LOPE	Grand Canyon Education Inc	Education & Training Services	778.20	12.2	15.0	2.780	4.862	5.0
ROST	Ross Stores Inc	Apparel Stores	11,940.00	7.1	12.3	2.510	3.992	5.0
SUI	Sun Communities Inc	REIT - Residential	674.73	10.8	10.8	2.116	3.190	6.0
THO	Thor Industries Inc	Recreational Vehicles	4,582.11	7.7	9.6	4.910	7.085	6.0

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Current Screen  
 Selected Criteria

Results

Show 25 entries Filter:

Symbol	Company Name	Industry	Sales	Proj 1 Yr EPS Gr	Proj 5 Yr EPS Gr	1Yr Proj EPS	5Yr Proj EPS	Quality Rating
		Internet & Information	10,561.93	20.0	7.9	15.139	20,520	6.0
		Cooperative Banks	327.35	20.0	10.0	1,850	2,709	6.0
CACC	Credit Acceptance Corp	Credit Services	825.30	9.8	9.8	17,348	25,216	6.0
CCL.A.TO	CCL Industries Inc	Packaging & Containers	3,039.11	9.2	9.2	8,380	11,916	6.0
CCL.B.TO	CCL Industries Inc	Packaging & Containers	3,039.11	9.2	9.2	8,380	11,916	6.0
CMD	Cantel Medical Corp	Medical Instruments & Supplies	664.76	13.1	13.1	1,440	2,356	6.0
DOL.TO	Dollar Stores	Stores	2,650.33	12.6	12.6	3,000	4,823	6.0
DY	Dycor	Glass & Construction	2,672.54	9.4	7.0	3,890	5,099	6.0
EGBN	Eagle Bancorp Inc	Banks - Regional - US	260.57	18.0	18.0	3,269	6,337	6.0
HEI	Heico Corp	Aerospace & Defense	1,376.26	9.9	12.5	2,290	3,668	6.0
HEIA	Heico Corp	Aerospace & Defense	1,376.26	9.9	12.5	2,290	3,668	6.0
LAD	Lithia Motors Inc	Auto & Truck Dealerships	7,864.25	10.8	4.2	6,910	8,146	5.0
LOPE	Grand Canyon Education Inc	Education & Training Services	778.20	12.2	15.0	2,780	4,862	5.0
ROST	Ross Stores Inc	Apparel Stores	11,940.00	7.1	12.3	2,510	3,992	5.0
SUI	Sun Communities Inc	REIT - Residential	674.73	10.8	10.8	2,116	3,190	6.0
THO	Thor Industries Inc	Recreational Vehicles	4,582.11	7.7	9.6	4,910	7,085	6.0

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Current Screen  
 Selected Criteria

Results

Quick View Graph

Use arrows to move to next/previous company.

Double-click in a row to display mini-historical graph.

Cantel Medical Corp (CMD)

Historical Sales Growth: 13.1 %

Historical EPS Growth: 23.4 %

Symbol	Company Name	Industry	Sales	Proj 1 Yr EPS Gr	Proj 5 Yr EPS Gr	1Yr Proj EPS	5Yr Proj EPS	Quality Rating
BIDU								6.0
BOFI								6.0
CACC								6.0
CCL.A.TO								6.0
CCL.B.TO								6.0
CMD	Cantel Medical Corp	Medical Instruments & Supplies	664.76	13.1	13.1	1,440	2,356	6.0
DOL.TO								6.0
DY								6.0
EGBN								6.0
HEI								6.0
HEIA								6.0
LAD								5.0
LOPE								5.0
ROST								5.0
SUI	Sun Communities Inc	REIT - Residential	674.73	10.8	10.8	2,116	3,190	6.0
		Recreational Vehicles	4,582.11	7.7	9.6	4,910	7,085	6.0

The screenshot shows the MyStockProspector.com website. At the top, there is a navigation bar with 'Home', 'Define Criteria', 'Pre-Defined Screens', and 'Help'. A 'Selected Criteria' section is highlighted with a callout box that says 'Click "Selected Criteria" to see how screen is constructed.' Below this, a table lists various criteria and their corresponding values. A second callout box points to an 'Edit Criteria' button, saying 'Click "Edit Criteria" to customize.' Below the criteria table is a 'Results' section with a table of stock data. The table has columns for Symbol, Company Name, Industry, Sales, Proj 1 Yr EPS Gr, Proj 5 Yr EPS Gr, 1Yr Proj EPS, 5Yr Proj EPS, and Quality Rating. The results table contains several rows of data for various companies like BIDU, BOFI, CACC, CCL.A.TO, CCL.B.TO, and CMD.

Criteria	Value	Count
Hist 5Yr EPS Gr(%)	between IA-Current and 5964.7	
Hist 5Yr Rev Gr(%)	between IA-Current and 2544.9	
Quality Rating	between 3.4 and 8.0	
Hist 3Yr Rev Gr(%)	between IA-Current and 96440.7	
Hist 1Yr Rev Gr(%)	between IA-Current and 100.0	
Hist 3Yr EPS Gr(%)	between IA-Current and 1107900.0	
Hist 1Yr EPS Gr(%)	between IA-Current and 100.0	

Symbol	Company Name	Industry	Sales	Proj 1 Yr EPS Gr	Proj 5 Yr EPS Gr	1Yr Proj EPS	5Yr Proj EPS	Quality Rating
BIDU	Baidu Inc	Internet Content & Information	10,561.93	20.0	7.9	15.139	20.520	6.0
BOFI	Boji Holding Inc	Savings & Cooperative Banks	327.35	20.0	10.0	1.850	2.709	6.0
CACC	Credit Acceptance Corp	Credit Services	825.30	9.8	9.8	17.348	25.216	6.0
CCL.A.TO	CCL Industries Inc	Packaging & Containers	3,039.11	9.2	9.2	8.380	11.916	6.0
CCL.B.TO	CCL Industries Inc	Packaging & Containers	3,039.11	9.2	9.2	8.380	11.916	6.0
CMD	Camel Medical Corp	Medical Instruments & Supplies	664.76	13.1	13.1	1.440	2.356	6.0

## Additional Navigation Tips

- ▶ Set number of entries to Show per page.
- ▶ Expand Table (useful for reports with many items).
- ▶ Exclude Industries if industry records appear in results.
- ▶ Exclude Junk companies from results (requires creating your Junk criteria first).
- ▶ Save Criteria.
- ▶ Edit Criteria.
- ▶ Export Results (in CSV format, readable in spreadsheet programs).
- ▶ Email Results (to one or more recipients who can view but not edit screen, no login required).
- ▶ Filter company name to quickly jump to that record.





# Creating Custom Screens



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## 3 Steps to Screen Stocks

1. Define Criteria
2. Define Report
3. View Results



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## 1. Define Criteria

- ▶ Select Criteria Group, then select multiple criteria & click arrow button to add to "Selected Fields."
- ▶ Next, enter minimum and/or maximum values for each:



- ▶ Tool shows min & max values for that field from entire database.
- ▶ Type in values OR use slider to adjust.
- ▶ Click "Field Totals" to see total number of records at right



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## Categories & Criteria

- ▶ Criteria are grouped into 8 Categories:
  1. Growth
  2. Value
  3. Quality
  4. Safety
  5. Projection
  6. Proxy Judgment
  7. Trend
  8. Other
- ▶ See Help for criteria in each & definitions.



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## Searching for Midsized Growth Stocks

- ▶ Growth
  - ▶ Hist 10Yr Rev Gr (%) >15
  - ▶ Hist 10Yr EPS Gr (%) >15
- ▶ Quality
  - ▶ EPS R<sup>2</sup> 10yr >0.9
  - ▶ Trend PTI = Even or higher
- ▶ Safety
  - ▶ Sales between \$1B & \$10B (\$1000M & \$10,000M)



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The screenshot shows a web browser window with the URL [www.mystockprospector.com/Tabs/DefineCriteria/Growth.aspx](http://www.mystockprospector.com/Tabs/DefineCriteria/Growth.aspx). The page features the MyStockProspector logo and a navigation menu with options: Home, Define Criteria (selected), Define Report, View Results, My Saved Screens, Pre-Defined Screens, and Help. A user greeting "Welcome gerlach" is visible, along with a "Log Out" link and a "My Account" link. The "Renewal date: 12/29/2015" is also shown. The main content area is divided into three sections: "Growth" (with sub-categories: Value, Quality, Safety, Projection, Proxy Judgment, Trend, Other), "Field List" (a scrollable list of financial metrics such as "Hist 10Yr Rev Gr(%)", "Hist 5Yr Rev Gr(%)", "Hist 3Yr Rev Gr(%)", "Hist 1Yr Rev Gr(%)", "Last 4Q Rev Gr(%)", "Q Rev Gr(%)", "Hist 10Yr EPS Gr(%)", "Hist 5Yr EPS Gr(%)", "Hist 3Yr EPS Gr(%)", "Hist 1Yr EPS Gr(%)", "Last 4Q EPS Gr(%)", "Q EPS Gr(%)", "Hist 5Yr Price Gr(%)", "Hist 3Yr Price Gr(%)", "Hist 1Yr Price Gr(%)", "Div Gr(%)", "Book Value Gr(%)", "Cash Flow Gr(%)", "Implied Gr(%)", "Hist Share Gr(%)"), and "Selected Fields" (currently empty, displaying the message "Currently you haven't selected any report criteria.").

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 www.mystockprospector.com/Tabs/DefineCriteria/Growth.aspx

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Home | **Define Criteria** | Define Report | View Results | My Saved Screens | Pre-Defined Screens | Help

Start Over | Report Fields | Results | Pin Toolbar | Field Totals | Running Totals

**Growth**  
 Value  
 Quality  
 Safety  
 Projection  
 Proxy Judgment  
 Trend  
 Other

**Field List**

- Hist 10Yr Rev Gr(%)
- Hist 5Yr Rev Gr(%)
- Hist 3Yr Rev Gr(%)
- Hist 1Yr Rev Gr(%)
- Last 4Q Rev Gr(%)
- Q Rev Gr(%)
- Hist 10Yr EPS Gr(%)
- Hist 5Yr EPS Gr(%)
- Hist 3Yr EPS Gr(%)
- Hist 1Yr EPS Gr(%)
- Last 4Q EPS Gr(%)
- Q EPS Gr(%)
- Hist 5Yr Price Gr(%)
- Hist 3Yr Price Gr(%)
- Hist 1Yr Price Gr(%)
- Div Gr(%)
- Book Value Gr(%)
- Cash Flow Gr(%)
- Implied Gr(%)
- Hist Share Gr(%)

**Selected Fields**

Condition	Item	Criteria	Record Count
	Hist 10Yr Rev Gr(%)	15	744
AND	Hist 10Yr EPS Gr(%)	15	307

MyStockProspector.com  
 www.mystockprospector.com/Tabs/DefineCriteria/Quality.aspx

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Home | **Define Criteria** | Define Report | View Results | My Saved Screens | Pre-Defined Screens | Help

Start Over | Report Fields | Results | Pin Toolbar | Field Totals | Running Totals

**Quality**  
 Growth  
 Value  
 Safety  
 Projection  
 Proxy Judgment  
 Trend  
 Other

**Field List**

- Rev R2 10Yr
- Rev R2 5Yr
- Rev R2 3Yr
- EPS R2 10yr
- EPS R2 5yr
- EPS R2 3yr
- Dividend R2 10Yr
- Com Equity R2 10Yr
- Avg 5Yr ROE(%)
- Avg 5Yr PTI(%)
- Trend ROE
- Trend PTI
- ROE Rating
- PTI Rating
- Inventory Turnover

**Selected Fields**

Condition	Item	Criteria	Record Count
	Hist 10Yr Rev Gr(%)	15	744
AND	EPS R2 10yr	0.85	307
AND	Trend PTI	Even	307

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## PTI/ROE Trend & Ratings

- Includes fields that measure trends of Section 2A & 2B of Stock Selection Guide.

Trend	--	-	-+	Even	+	+-	++
Rating	0	1	2	3	4	5	6

Stable or growing.



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The screenshot shows the MyStockProspector.com interface. The user is logged in as Doug Gerlach, with a renewal date of 12/29/2015. The navigation menu includes Home, Define Criteria, Define Report, View Results, My Saved Screens, Pre-Defined Screens, and Help. The main content area is titled "Define Criteria" and shows a "Field List" on the left and "Selected Fields" on the right. The "Field List" includes categories like Growth, Value, Quality, Safety, Projection, Proxy Judgment, Trend, and Other. The "Selected Fields" table shows the following criteria:

Condition	Item	Criteria	Record Count
	Hist 10Yr Rev Gr(%)	15	744
AND	Hist 10Yr EPS Gr(%)	15	307
AND	EPS R2 10yr	0.85	42
AND	Trend PTI	Even	23
AND	Sales(\$)	1000	9

The "Record Count" for the "Sales(\$)" field is circled in red. The "Trend PTI" field is also highlighted with a red circle and a red arrow pointing to it from the "Safety" category in the "Field List".

## How Many Results?

- ▶ Too many or too few companies passing screen means criteria may be too “loose” or too “tight.”
- ▶ Use “Field Totals” button to see which criteria may be too restrictive.
- ▶ Adjust criteria as needed.
- ▶ 10-30 results is good goal.



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## 2. Define Report

- ▶ Add additional criteria to Results, such as:
  - ▶ Company name.
  - ▶ Sector/industry.
  - ▶ P/E Ratio.
  - ▶ Relative Value.
  - ▶ 52-week high & low prices.
- ▶ Useful to add informational fields that provide insight, but that you don't want to search on.



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 www.mystockprospector.com/Tabs/DefineReport/Other.aspx

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Home | Define Criteria | **Define Report** | View Results | My Saved Screens | Pre-Defined Screens | Help

Start Over | Report Fields | Results | Pin Toolbar

Field List

- Company Name
- Exchange
- Industry
- Sector
- SIC No
- Date Info
- Last Quarter Date
- Price Last Updated
- Current Price(\$)
- 52W Hi Price(\$)
- 52W Low Price(\$)
- Last Full Yr
- Num Yrs of Data
- Current EPS
- Current Div
- Inside Ownership(%)
- Institutional Holdings(%)
- ADR

Selected Fields

- Symbol (mandatory field)
- Hist 10Yr Rev Gr(%)
- Hist 10Yr EPS Gr(%)
- EPS R2 10yr
- Trend PTI
- Sales(\$)

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MyStockProspector.com x  
 www.mystockprospector.com/Tabs/DefineReport/Value.aspx

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Home | Define Criteria | **Define Report** | View Results | My Saved Screens | Pre-Defined Screens | Help

Start Over | Report Fields | Results | Pin Toolbar

Field List

- Avg 5Yr Low PE
- Avg 5Yr High PE
- Avg PE
- Current PE
- PE / Hist EPS Gr
- PE / Proj EPS Gr
- Rel Value
- % From 52W Low(%)
- % From 52W Hi(%)
- Price / Sales
- Price / Cash Flow
- Price / Book Value
- PE / Avg ROE
- CashFlow / Share
- Cur Div Yield(%)
- Avg Div Yield(%)
- Tax Rate(%)
- Payback

Selected Fields

- Symbol (mandatory field)
- Hist 10Yr Rev Gr(%)
- Hist 10Yr EPS Gr(%)
- EPS R2 10yr
- Trend PTI
- Sales(\$)
- Company Name
- Industry
- Sector
- Current Price(\$)
- 52W Hi Price(\$)
- 52W Low Price(\$)

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Start Over | Report Fields | Results | Pin Toolbar

**Field List**

- Avg 5Yr Low PE
- Avg 5Yr High PE
- Avg PE
- PE / Hist EPS Gr
- PE / Proj EPS Gr
- % From 52W Low(%)
- % From 52W Hi(%)
- Price / Sales
- Price / Cash Flow
- Price / Book Value
- PE / Avg ROE
- CashFlow / Share
- Cur Div Yield(%)
- Avg Div Yield(%)
- Tax Rate(%)
- Payback

**Selected Fields**

- Symbol (mandatory field)
- Hist 10Yr Rev Gr(%)
- Hist 10Yr EPS Gr(%)
- EPS R2 10yr
- Trend PTI
- Sales(\$)
- Company Name
- Industry
- Sector
- Current Price(\$)
- 52W Hi Price(\$)
- 52W Low Price(\$)
- Current PE
- Rel Value

Click & drag field to arrange in desired order.

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Start Over | Report Fields | Results | Pin Toolbar

**Field List**

- Avg 5Yr Low PE
- Avg 5Yr High PE
- Avg PE
- PE / Hist EPS Gr
- PE / Proj EPS Gr
- % From 52W Low(%)
- % From 52W Hi(%)
- Price / Sales
- Price / Cash Flow
- Price / Book Value
- PE / Avg ROE
- CashFlow / Share
- Cur Div Yield(%)
- Avg Div Yield(%)
- Tax Rate(%)
- Payback

**Selected Fields**

- Symbol (mandatory field)
- Company Name
- Industry
- Sector
- Sales(\$)
- Hist 10Yr Rev Gr(%)
- Hist 10Yr EPS Gr(%)
- EPS R2 10yr
- Trend PTI
- Current Price(\$)
- 52W Hi Price(\$)
- 52W Low Price(\$)
- Current PE
- Rel Value

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### 3. View Results

- ▶ Same as with Pre-Defined Criteria.
- ▶ Ticker column is fixed; on wide tables, popup label with company names appears when mouse hovers in row.
- ▶ Sort as desired.
- ▶ Can return to Define Criteria or Define Report if desired.



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The screenshot shows the MyStockProspector.com interface. At the top, there's a navigation bar with options like 'Define Criteria', 'Define Report', 'View Results', 'My Saved Screens', 'Pre-Defined Screens', and 'Help'. Below this, there's a 'Results' section with a table of stock data. The table includes columns for Symbol, Company Name, Industry, Sector, Sales(\$), Hist 10Yr Rev Gr(%), Hist 10Yr EPS Gr(%), EPS R2 10yr, and Trend PTI. The first row is highlighted in yellow.

Symbol	Company Name	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr	Trend PTI
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	4,124.90	17.1	15.1	0.88	+
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	4,501.22	20.7	31.7	0.98	Even
EDU	New Oriental Education & Technology Group Inc	Education & Training Services	Consumer Defensive	1,478.35	30.6	23.7	0.96	Even
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	1,995.03	17.2	24.9	0.93	Even
MIDD	The Middleby Corp	Diversified Industrials	Industrials	1,826.60	18.1	17.7	0.95	Even
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Defensive	2,722.56	17.4	22.1	0.94	++
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	9,223.99	28.0	46.8	0.96	+
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	3,289.00	19.7	32.0	0.94	++
ULTA	Ulta Salon Cosmetics & Fragrance Inc	Specialty Retail	Consumer Cyclical	3,924.12	20.1	36.3	0.95	Even

Showing 1 to 9 of 9 entries

! NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our [FAQ](#)

## Save Screen

- ▶ Click Current Screen at top, then enter Screen Name & Description.
- ▶ Click Save button to save to "My Saved Screens."
- ▶ Next time you open screen, it will show current results using updated data.



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The screenshot shows the MyStockProspector.com interface. At the top, there is a navigation bar with links for Home, Define Criteria, Define Report, View Results, My Saved Screens, Pre-Defined Screens, and Help. The user is logged in as Doug Gerlach, with a renewal date of 12/29/2015.

The 'Current Screen' section shows a screen named 'Mid-Sized Growth Stocks' with the description 'January 2017'. A 'Save' button is visible next to the screen name.

Below the 'Selected Criteria' section, there is a 'Results' table. The table has columns for Symbol, Company Name, Industry, Sector, Sales(\$), Hist 10Yr Rev Gr(%), Hist 10Yr EPS Gr(%), EPS R2 10yr, and Tre. The table displays 9 entries, showing the first 9 of 9 entries.

Symbol	Company Name	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr	Tre
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	4,124.90	17.1	15.1	0.88	+
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	4,501.22	20.7	31.7	0.98	Eve
EDU	New Oriental Education & Technology Group Inc	Education & Training Services	Consumer Defensive	1,478.35	30.6	23.7	0.96	Eve
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	1,995.03	17.2	24.9	0.93	Eve
MIDD	The Middleby Corp	Diversified Industrials	Industrials	1,826.60	18.1	17.7	0.95	Eve
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Defensive	2,722.56	17.4	22.1	0.94	++
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	9,223.99	28.0	46.8	0.96	++
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	3,289.00	19.7	32.0	0.94	++
ULTA	Ulta Salon Cosmetics & Fragrance Inc	Specialty Retail	Consumer Cyclical	3,924.12	20.1	36.3	0.95	Eve

Showing 1 to 9 of 9 entries

## Export to Excel

▶ Click Export button:

The screenshot shows the 'Results' page with the following data:

Symbol	Company Name	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	4,124.90	17.1	15.1	0.8
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	4,501.22	20.7	31.7	0.9
EDU	New Oriental Education & Technology Group Inc	Education & Training Services	Consumer Defensive	1,478.35	30.6	23.7	0.9
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	1,995.03	17.2	24.9	0.9
MIDD	The Middleby Corp	Diversified Industrials	Industrials	1,826.60	18.1	17.7	0.9
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Defensive	2,722.56	17.4	22.1	0.9
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	9,223.99	28.0	46.8	0.9
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	3,289.00	19.7	32.0	0.9
ULTA	Ulta Salon Cosmetics & Fragrance Inc	Specialty Retail	Consumer Cyclical	3,924.12	20.1	36.3	0.9

Showing 1 to 9 of 9 entries

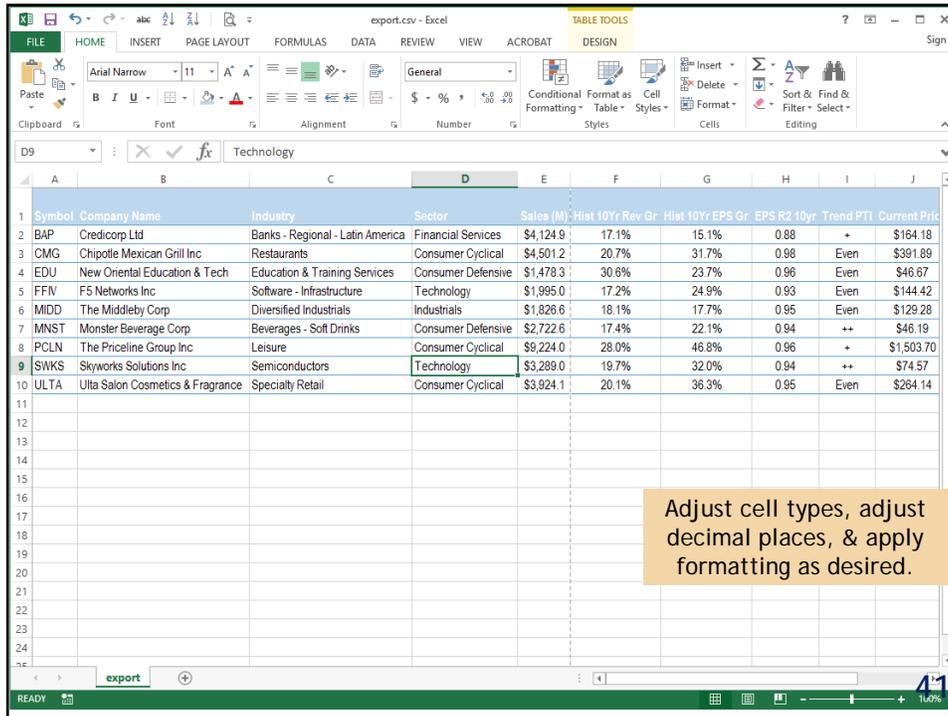
NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our [FAQ](#)

doPostBack('ctl00\$MainContent\$btnExport1','')

Values are raw numbers.

	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr	Trend PTI	Current Price(\$)	52W HI Price(\$)	52W Lo
1	Banks - Regional - Latin America	Financial Services	4124.897	0.1713622	0.1511859	0.8814422	+	164.18	166.26	
2	Restaurants	Consumer Cyclical	4501.2231	0.2065885	0.3173063	0.9751019	Even	391.89	542.5	
3	Education & Training Services	Consumer Defensive	1478.348	0.3061612	0.2366025	0.9588884	Even	46.67	53.38	
4	Software - Infrastructure	Technology	1995.0341	0.1720473	0.2487488	0.932409	Even	144.42	148.34	
5	Diversified Industrials	Industrials	1826.598	0.1807141	0.1766835	0.9515992	Even	129.28	143.6	
6	Beverages - Soft Drinks	Consumer Defensive	2722.564	0.1739261	0.2210757	0.9421715	++	46.19	55.5	
7	Leisure	Consumer Cyclical	9223.9873	0.2795199	0.4683834	0.9599541	+	1503.7	1600.9301	
8	Semiconductors	Technology	3289	0.1966086	0.3195415	0.9387895	++	74.57	82.275	
9	Specialty Retail	Consumer Cyclical	3924.116	0.2008669	0.362983	0.9535997	Even	264.14	278.626	

Power Stock Searches with MyStockProspector.com  
 Doug Gerlach, gerlach@iclub.com

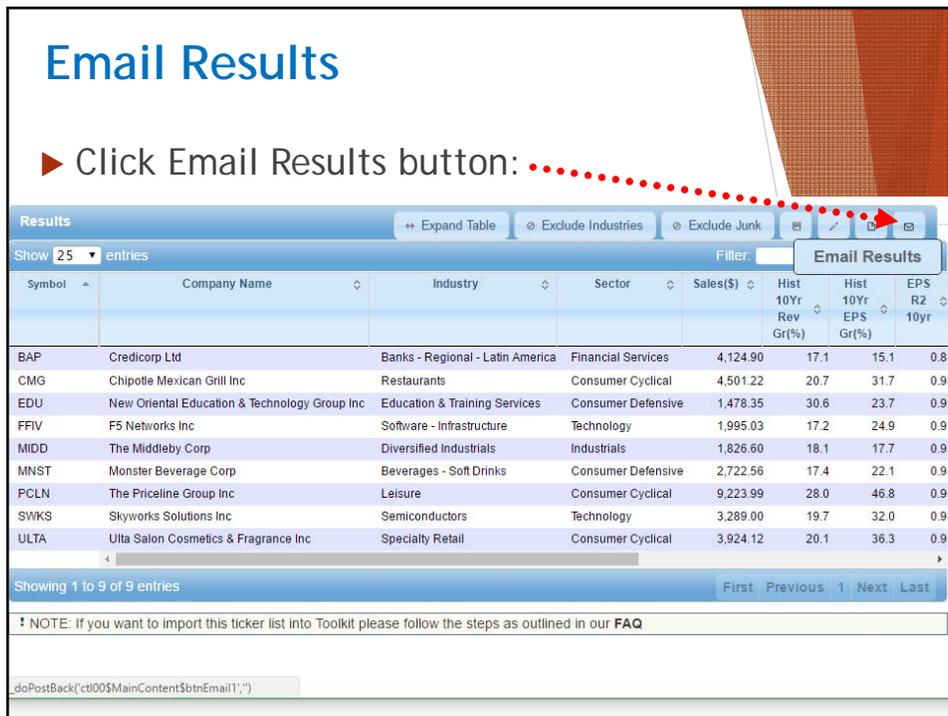


Adjust cell types, adjust decimal places, & apply formatting as desired.

Symbol	Company Name	Industry	Sector	Sales (M)	Hist 10Yr Rev Gr	Hist 10Yr EPS Gr	EPS R2 10yr	Trend PTI	Current Price
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	\$4,124.9	17.1%	15.1%	0.88	+	\$164.18
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	\$4,501.2	20.7%	31.7%	0.98	Even	\$391.89
EDU	New Oriental Education & Tech	Education & Training Services	Consumer Defensive	\$1,478.3	30.6%	23.7%	0.96	Even	\$46.67
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	\$1,995.0	17.2%	24.9%	0.93	Even	\$144.42
MIDD	The Middleby Corp	Diversified Industrials	Industrials	\$1,826.6	18.1%	17.7%	0.95	Even	\$129.28
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Defensive	\$2,722.6	17.4%	22.1%	0.94	++	\$46.19
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	\$9,224.0	28.0%	46.8%	0.96	+	\$1,503.70
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	\$3,289.0	19.7%	32.0%	0.94	++	\$74.57
ULTA	Ulta Salon Cosmetics & Fragrance	Specialty Retail	Consumer Cyclical	\$3,924.1	20.1%	36.3%	0.95	Even	\$264.14

## Email Results

▶ Click Email Results button:



Results

Expand Table Exclude Industries Exclude Junk

Show 25 entries Filter: Email Results

Symbol	Company Name	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	4,124.90	17.1	15.1	0.8
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	4,501.22	20.7	31.7	0.9
EDU	New Oriental Education & Technology Group Inc	Education & Training Services	Consumer Defensive	1,478.35	30.6	23.7	0.9
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	1,995.03	17.2	24.9	0.9
MIDD	The Middleby Corp	Diversified Industrials	Industrials	1,826.60	18.1	17.7	0.9
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Defensive	2,722.56	17.4	22.1	0.9
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	9,223.99	28.0	46.8	0.9
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	3,289.00	19.7	32.0	0.9
ULTA	Ulta Salon Cosmetics & Fragrance Inc	Specialty Retail	Consumer Cyclical	3,924.12	20.1	36.3	0.9

Showing 1 to 9 of 9 entries First Previous 1 Next Last

NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our FAQ

doPostBack('ctl00\$MainContent\$btnEmail1','')

## Customize Email

- ▶ Enter Recipient(s) & text of message.

The screenshot shows the 'Email Link' dialog box with the following content:

Email:

Enter email addresses separated by commas.

Body:

Buttons: OK, CANCEL

The background shows a table of stock results with columns for Symbol, Company, and various financial metrics.

Symbol	Company	Price	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr
BAP	Credicorp Ltd	4,124.90	17.1	15.1	0.8
CMG	Chipotle Mexican Grill	4,501.22	20.7	31.7	0.9
EDU	New Oriental Education & Technology Group Inc	1,478.35	30.6	23.7	0.9
FFIV	F5 Networks Inc	1,995.03	17.2	24.9	0.9
MIDD	The Middleby Corp	1,826.60	18.1	17.7	0.9
MNST	Monster Beverage Corp	2,722.56	17.4	22.1	0.9
PCLN	The Priceline Group Inc	9,223.99	28.0	46.8	0.9
SWKS	Skyworks Solutions Inc	3,289.00	19.7	32.0	0.9
ULTA	Ulta Salon Cosmetics & Fragrance Inc	3,924.12	20.1	36.3	0.9

Showing 1 to 9 of 9 entries

! NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our [FAQ](#)

## Email Arrives at Recipient w/Link

The email content is as follows:

From: info@iclub.com  
 To: Doug Gerlach  
 Subject: Shared MyStockProspector Screen

We removed extra line breaks from this message.

<http://www.mystockprospector.com/Tabs/ViewResults.aspx?emailink=8288>

Please find a link to my screen attached.

The above link will expire in 10 days, so don't delay – click it today!

With best regards,  
 Doug Gerlach

NOTE: This message was sent from an email address that does not accept inbound messages. To reply directly to the sender, please email them at [gerlach@iclub.com](mailto:gerlach@iclub.com).

This e-mail was sent by ICLUBcentral | 711 W. 13 Mile Road | Madison Heights | MI | 48071 © 2016 ICLUBcentral Inc. All Rights Reserved.

MyStockProspector.com

Home | Define Criteria | Define Report | **View Results** | My Saved Screens | Pre-Defined Screens | Help

Current Screen

Selected Criteria

Results

Show 10 entries

Symbol	Company Name	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	4,124.90	17.1	15.1	0.8
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	4,501.22	20.7	31.7	0.9
EDU	New Oriental Education & Technology Group Inc	Education & Training Services	Consumer Defensive	1,478.35	30.6	23.7	0.9
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	1,065.03	17.3	24.0	0.0
MIDD	The Middleby Corp	Diversified Industrials	Consumer Cyclical	1,000.00	17.3	24.0	0.0
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Cyclical	1,000.00	17.3	24.0	0.0
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	1,000.00	17.3	24.0	0.0
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	1,000.00	17.3	24.0	0.0
ULTA	Ulta Salon Cosmetics & Fragrance Inc	Specialty Retail	Consumer Cyclical	3,924.12	20.1	36.3	0.9

Showing 1 to 9 of 9 entries

! NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our [FAQ](#)

Advanced User Tips

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## Create Junk Screen

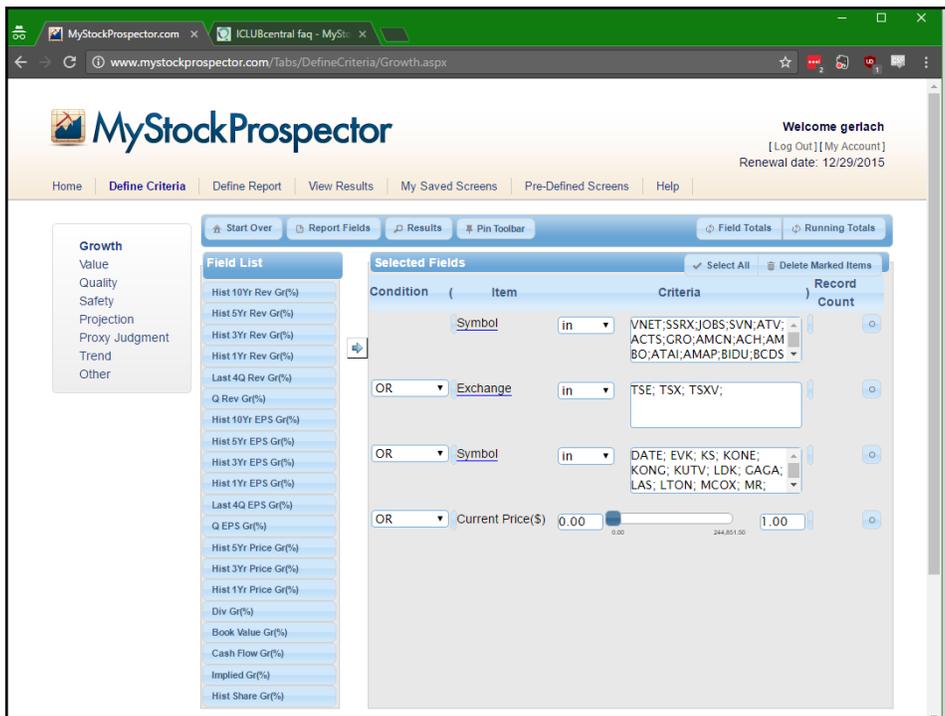
- ▶ Junk screen is method of eliminating stocks you want to always avoid, such as:
  - ▶ Penny stocks (price below \$1).
  - ▶ Canadian companies.
  - ▶ Companies in particular industry.
- ▶ Create in My Saved Screens.

**Junk Screen**

The Junk Screen is used to identify companies you consider to be "junk," such as penny stocks or companies with no earnings. Once defined with your personal criteria, the Results display of any search will offer you the opportunity to "Exclude Junk" from your results.

Name	Description	Action
My Junk Screen	Criteria that defines what you consider to be junk companies	 

Showing 1 to 1 of 1 entries



The screenshot shows the 'Define Criteria' interface for 'Growth' on MyStockProspector.com. The user is logged in as 'gerlach' with a renewal date of 12/29/2015. The interface includes a 'Field List' on the left with various growth-related metrics like 'Hist 10Yr Rev Gr(%)' and 'Q Rev Gr(%)'. The 'Selected Fields' section on the right shows a list of criteria: 'Symbol in VNET;SSRX;JOBS;SVN;ATV;ACTS;GRO;AMCN;ACH;AMBO;ATAI;AMAP;BIDU;BCDS', 'Exchange in TSE; TSX; TSXV;', 'Symbol in DATE; EVK; KS; KONE; KONG; KUTV; LDK; GAGA; LAS; LTON; MCOX; MR;', and 'Current Price(\$)' with a range from 0.00 to 1.00. The interface also features navigation tabs like 'Start Over', 'Report Fields', 'Results', and 'Pin Toolbar'.

Power Stock Searches with MyStockProspector.com  
 Doug Gerlach, gerlach@iclub.com

Welcome gerlach  
 [ Log Out ][ My Account ]  
 Renewal date: 12/29/2015

Home | Define Criteria | Define Report | **View Results** | My Saved Screens | Pre-Defined Screens

Current Screen  
 Selected Criteria

Results Shrink Table Exclude Industries Include Junk

NOTE: Junk companies have been removed from your results.

Show 10 entries

Symbol	Company Name	Industry	Sector	Sales(\$)	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	EPS R2 10yr	Trend PTI
BAP	Credicorp Ltd	Banks - Regional - Latin America	Financial Services	4,124.90	17.1	15.1	0.88	+
CMG	Chipotle Mexican Grill Inc	Restaurants	Consumer Cyclical	4,501.22	20.7	31.7	0.98	Even
FFIV	F5 Networks Inc	Software - Infrastructure	Technology	1,995.03	17.2	24.9	0.93	Even
MIDD	The Middleby Corp	Diversified Industrials	Industrials	1,826.60	18.1	17.7	0.95	Even
MNST	Monster Beverage Corp	Beverages - Soft Drinks	Consumer Defensive	2,722.56	17.4	22.1	0.94	++
PCLN	The Priceline Group Inc	Leisure	Consumer Cyclical	9,223.99	28.0	46.8	0.96	++
SWKS	Skyworks Solutions Inc	Semiconductors	Technology	3,289.00	19.7	32.0	0.94	++
ULTA	Ulta Salon Cosmetics & Fragrance Inc	Specialty Retail	Consumer Cyclical	3,924.12	20.1	36.3	0.95	Even

Showing 1 to 8 of 8 entries First Previous 1 Next Last

\* NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our [FAQ](#)

## Industry Averages

- ▶ Each industry group has record in database, with average (weighted by revenue) of each field.
  - ▶ NOTE: Some are nonsensical, like weighted current price.
- ▶ Industry records are identified by Exchange = INDUS.

Start Over | Report Fields | Results | Pin Toolbar | Field Totals | Running Totals

Growth  
 Value  
 Quality  
 Safety  
 Projection  
 Proxy Judgment  
 Trend  
 Other

Field List

- Hist 10Yr Rev Gr(%)
- Hist 5Yr Rev Gr(%)
- Hist 3Yr Rev Gr(%)
- Hist 1Yr Rev Gr(%)
- Last 4Q Rev Gr(%)
- Q Rev Gr(%)
- Hist 10Yr EPS Gr(%)

Selected Fields

Condition( Item Criteria ) Record Count

Exchange = INDUS

## Define Report & View Results

**Current Screen**

Screen Name:  Save

Description:  Save

**Selected Criteria**

results Shrink Table Exclude Industries Exclude Junk Filter

row 25 entries

Symbol	Company Name	Cur Div Yield(%)	Sales(\$)	Current PE	Avg PE	Hist 10Yr Rev Gr(%)	Hist 5Yr Rev Gr(%)	Hist 3Yr Rev Gr(%)	Hist 1Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)
	Advertising Agencies	2.3	13,587.23	27.5	25.5	5.2	5.9	3.0	4.4	5.9
	Aerospace & Defense	1.9	42,863.38	18.2	14.0	4.9	4.2	5.0	4.1	10.4
	Agricultural Inputs	2.5	19,845.45	16.8	17.2	10.2	9.8	2.8	3.0	13.7
	Airlines	0.5	23,484.33	23.2	29.7	12.6	16.3	8.7	6.7	15.3
	Airports & Air Services	1.4	1,262.44	21.1	19.8	5.5	9.2	7.4	4.8	9.0
	Aluminum	0.4	22,195.60	27.7	88.2	11.5	14.7	5.0	8.0	0.0
	Apparel Manufacturing	0.9	5,875.33	31.3	23.0	10.3	14.8	10.6	11.2	11.3
	Apparel Stores	1.5	11,539.61	24.7	18.6	6.7	8.2	6.7	5.3	11.9
	Asset Management	2.8	7,456.05	18.2	24.7	9.4	14.2	9.7	15.8	10.1
	Auto & Truck Dealerships	0.5	11,190.53	18.0	14.9	3.3	14.8	13.1	12.8	10.4
	Auto Manufacturers	2.4	182,301.51	11.1	19.0	4.2	7.4	6.6	11.3	12.1
	Auto Parts	1.1	19,868.34	21.6	16.8	4.5	11.2	5.0	6.9	11.3

## Generate Industry Study Data

- ▶ Use Industry = (or Industry IN for multiple industries).
- ▶ Start to type name of industry & program will display matching list of names:

AND  =

- Utilities - Diversified
- Utilities - Independent Power Producers
- Utilities - Regulated Electric
- Utilities - Regulated Gas
- Utilities - Regulated Water

The screenshot shows the MyStockProspector.com interface. The user is logged in as 'gerlach' with a renewal date of 12/29/2015. The 'View Results' tab is active. A note states: 'NOTE: Industries have been removed from your results.' The results table shows 7 entries for the Home Improvement Stores industry. The table columns are: Symbol, Company Name, Industry, Avg 5Yr ROE(%), Avg 5Yr PTI(%), Trend PTI, PTI Rating, Inventory Turnover, and Debt / Capital(%).

Symbol	Company Name	Industry	Avg 5Yr ROE(%)	Avg 5Yr PTI(%)	Trend PTI	PTI Rating	Inventory Turnover	Debt / Capital(%)
HD	The Home Depot Inc	Home Improvement Stores	47.0	10.7	++	6	6.7	73.3
HVT	Haverty Furniture Companies Inc	Home Improvement Stores	7.1	4.0	→	4	8.1	14.3
HVTA	Haverty Furniture Companies Inc	Home Improvement Stores	7.1	4.0	→	4	8.1	14.3
LL	Lumber Liquidators Holdings Inc	Home Improvement Stores	11.8	6.0	→	2	3.9	8.4
LOW	Lowe's Companies Inc	Home Improvement Stores	19.1	6.8	→	6	5.4	53.0
TBL.TO	Taiga Building Products Ltd	Home Improvement Stores	-21.1	1.1	→	6	12.5	78.3
TTS	Tile Shop Holdings Inc	Home Improvement Stores	19.3	-5.2	→	6	4.4	32.1

Showing 1 to 7 of 7 entries. A note at the bottom states: 'NOTE: If you want to import this ticker list into Toolkit please follow the steps as outlined in our FAQ'.

## Find Companies at Top of Peers

- ▶ Any criteria minimum or maximum can be set to Industry Average of each company's industry.
- ▶ Right click in Min or Max field to display pop-up menu:

The screenshot shows the 'Selected Fields' configuration window. It lists four criteria with their current values and ranges. A pop-up menu is open over the 'Hist 5Yr Rev' field, showing options: 'Ind Avg - Current Field' (value 2544.9), 'Ind Avg - Other Fields' (value 2544.9), and 'Other Fields'.

Condition	Item	Criteria
	Hist 5Yr EPS	IA-Current 5964.7
AND	Hist 5Yr Rev	Ind Avg - Current Field 2544.9
AND	Quality Rating	3.4 0.0 8.0 8.0
AND	Hist 3Yr Rev Gr(%)	IA-Curri 96440.7

## Using Comparative Fields

- ▶ See Pre-Defined ICLUB Growth Screen for use of Industry Average comparisons.
- ▶ Especially useful in seeking companies with pre-tax profit margins higher than others in industry group.



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## Generate Custom Stock Reports

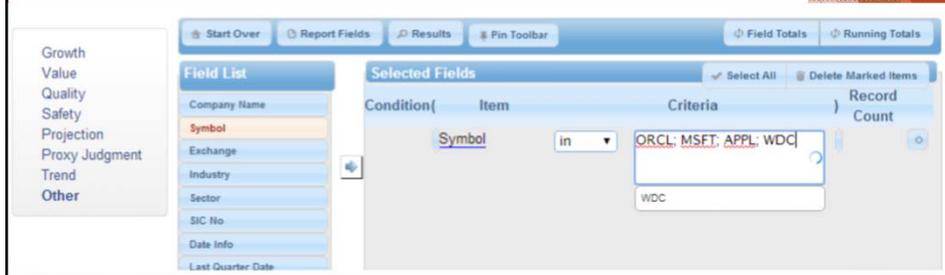
- ▶ Build reports with any criteria fields to manage portfolio or watch list.
- ▶ Instead of searching for new companies, feed in ticker symbols of companies you want to follow.
- ▶ Each time you return to website, receive updated data on those stocks.



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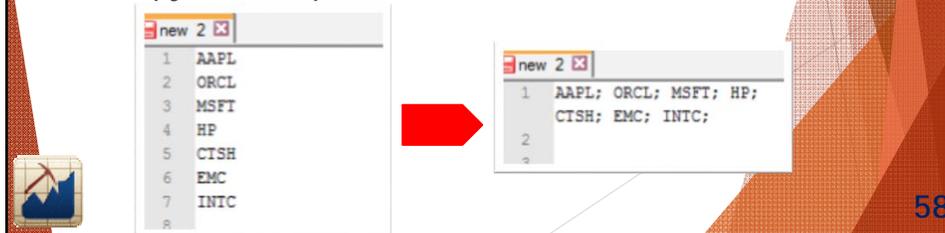
## Use "Symbol" Criteria

- ▶ In "Other" Group, select "Symbol."
- ▶ Use Condition "in."
- ▶ Type symbol, auto-complete will assist.
- ▶ Separate multiple symbols with semi-colons.



## Power Tip: Copy & Paste Symbols

- ▶ Use Word or text editor to replace carriage return with semi-colons in list of symbols.
  - ▶ Can export ticker list from TK6.
- ▶ Replacing carriage returns in Word:
  - ▶ Replace ^P with ; (*semi-colon space*).
  - ▶ Copy results, paste into Criteria field.



## Define Custom Report

- ▶ Add report fields as desired to create custom report of your own design.
- ▶ Or replicate Toolkit 6 Portfolio Reports or Comparison.



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## Criteria from TK6 Stock Comparison

Value	Field List	Selected Fields
Quality	Hist 5Yr Rev Gr(%)	Symbol (mandatory field)
Safety	Hist 2Yr Rev Gr(%)	Company Name
Projection	Hist 1Yr Rev Gr(%)	Exchange
Proxy Judgment	Last 4Q Rev Gr(%)	Industry
Trend	Q Rev Gr(%)	Sector
Other	Hist 5Yr EPS Gr(%)	Hist 10Yr Rev Gr(%)
	Hist 2Yr EPS Gr(%)	Hist 10Yr EPS Gr(%)
	Hist 1Yr EPS Gr(%)	Proj 5 Yr EPS Gr(%)
	Last 4Q EPS Gr(%)	Avg 5Yr PTI(%)
	Q EPS Gr(%)	Avg 5Yr ROE(%)
	Hist 5Yr Price Gr(%)	Inside Ownership(%)
	Hist 2Yr Price Gr(%)	Current Price(\$)
	Hist 1Yr Price Gr(%)	Avg 5Yr Low PE
	Div Gr(%)	Avg 5Yr High PE
	Book Value Gr(%)	Avg PE
	Cash Flow Gr(%)	Current PE
	Implied Gr(%)	Buy Below
	Hist Share Gr(%)	Sell Above
		U/D Ratio
		Cur Div Yield(%)
		Total Return(%)
		Div Payout(%)
		Rel Value
		EPS R2 10yr
		Last Quarter Date

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### 3 Advanced Spreadsheet Ideas

1. Set up report, then use VLOOKUP to index Symbols on separate "data" tab.
  - ▶ Paste new CSV file results into "data" tab to automatically update & recalculate.
2. Calculate averages or weighted averages of portfolio metrics.
  - ▶ What is weighted average future expected EPS growth of portfolio?
3. Compare company's %PTP to its industry average.



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### Use Nested Conditions

- ▶ Use OR & parentheses to group criteria.
- ▶ Add current stocks or watch list to search results, as below:

The screenshot shows the search interface with the following configuration:

- Field List:** Company Name, Symbol, Exchange, Industry, Sector, SIC No, Date Info, Last Quarter Date, Price Last Updated, Current Price(\$), 52W Hi Price(\$), 52W Low Price(\$).
- Selected Fields:** (Hist 5Yr EPS Gr(%), PE / Hist EPS Gr, Proj 5 Yr EPS Gr(%), Total Return(%), Symbol).
- Criteria:**
  - (Hist 5Yr EPS Gr(%): 15, Range: 0.0 to 14000.0, Record Count: 14040)
  - AND PE / Hist EPS Gr: 0.00, Range: 0.00 to 544.88, Record Count: 1
  - AND Proj 5 Yr EPS Gr(%): 15, Range: -100.0 to 100.0, Record Count: 100.0
  - AND Total Return(%): 15, Range: 0.0 to 1198.0, Record Count: 11580
  - OR Symbol: in, List: AAPL; ORCL; MSFT; HPQ; CTSH; EMC; INTC; Record Count: 57

## Nested Conditions Example

Selected Fields
✓ Select All
🗑️ Delete Marked Items

Condition	Item	Criteria	Record Count
	ROE Rating	2 <input type="range" value="2"/>	5920
AND	PTI Rating	2 <input type="range" value="2"/>	4004
AND	Hist 5Yr Rev Gr(%)	15 <input type="range" value="15"/>	747
AND	Hist 5Yr EPS Gr(%)	15 <input type="range" value="15"/>	212
AND	EPS R2 5yr	0.8 <input type="range" value="0.8"/>	86
AND	(Captztion - Millions(\$)	0.00 <input type="range" value="0.00"/>	3000
OR	Sales(\$)	0 <input type="range" value="0"/>	61
AND	Last 4Q EPS Gr(%)	15 <input type="range" value="15"/>	31
AND	Q EPS Gr(%)	15 <input type="range" value="15"/>	21

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## Results Using Nested Conditionals

show 25 entries
Filter:

Symbol	Company Name	Sales(\$)	Hist 5Yr Rev Gr(%)	Hist 5Yr EPS Gr(%)	EPS R2 3yr	PE / Hist EPS Gr	ROE Rating	PTI Rating	Inside Ownership(%)	Institutional Holdings(%)
AL	Air Lease Corp	1,222.84	35.7	40.2	0.70	0.00	6	4	1.5	9
ANET	Arista Networks Inc	837.59	59.8	51.3	0.95	0.00	3	2	0.5	7
ASGN	On Assignment Inc	2,065.01	33.5	22.0	0.56	0.97	4	2	8.9	9
BNCN	BNC Bancorp	204.25	21.8	31.9	0.94	19.96	6	6	4.1	6
BWLD	Buffalo Wild Wings Inc	1,812.72	22.8	18.3	0.76	1.23	2	2	4.9	9
EXP	Eagle Materials Inc	1,143.49	24.4	66.2	0.26	5.11	6	6	2.0	9
GRUB	GrubHub Inc	361.83	60.0	91.5	0.95	0.00	4	6	0.3	9
HNNA	Hennessy Advisors Inc	51.41	58.1	90.2	1.00	0.23	5	6	44.3	1
HOMB	Home BancShares Inc	421.21	25.2	21.9	0.95	1.00	3	5	1.3	6
KNOP	KNOT Offshore Partners LP	155.02	35.9	35.0	0.92	0.00	5	6	0.0	6
LCII	LCI Industries Inc	1,403.07	18.8	23.0	1.00	0.86	6	6	6.7	1
LMNR	Limoneira Co	100.31	19.1	38.5	0.75	0.00	4	6	2.0	3
PFSI	PennyMac Financial Services Inc	713.11	67.9	62.7	0.91	0.00	6	5	1.9	9
RNST	Renasant Corp	349.63	15.9	19.7	0.75	13.09	6	6	3.6	7
SFST	Southern First Bancshares Inc	46.95	15.5	57.8	0.92	1.27	6	6	11.4	7
SPNS	Sapiens International Corp NV	185.64	25.6	17.4	0.92	0.30	4	4	0.0	2
TSC	TriState Capital Holdings Inc	103.44	20.1	21.3	0.93	0.00	4	4	3.1	5
VEEV	Veeva Systems Inc	409.22	59.7	38.0	0.96	0.00	6	4	0.0	7
WFBI	WashingtonFirst Bankshares Inc	61.86	32.7	23.3	0.85	0.00	6	5	12.8	4

showing 1 to 19 of 19 entries
First Previous 1 Next Last

## Export Results to Toolkit 6

1. Export Results as Excel CSV file.
2. From Toolkit 6, select File > Import Company > Import Several at Once > Subscribed data source.
3. Click "Import Ticker List" button.
4. Navigate to folder where export.csv file downloaded in step #1 & change to All Files.
5. Select export.csv file & click Open.
6. Click OK button to import.
7. Select TK6 portfolio or create new portfolio where SSGs will be downloaded & created.

[http://www.iclub.com/faq/index.php?solution\\_id=1187](http://www.iclub.com/faq/index.php?solution_id=1187)



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## Roster of Quality Companies

- ▶ If you use StockCentral's Roster of Quality Companies, you can replicate results in MyStockProspector.
- ▶ In Safety group, select Quality Rating > 3.4.
  - ▶ This is Take Stock Quality Rating, on 0 - 10 scale.
  - ▶ May vary slightly from display on StockCentral or in TK6 due to calculation differences, rounding, & date of data.



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**Questions?**  
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