

Getting the Most Out of Your

MY STOCK PROSPECTOR

SUBSCRIPTION

USER GUIDE



MyStockProspector

The Most Powerful and Comprehensive Tool
for Long-Term-Based Stock Screening

 **ICLUB**central



MyStockProspector.com User Guide

What is Stock Screening?

Screening is a powerful tool used to help investors find companies worthy of study. You can use a stock screener to find candidates that meet your minimal criteria for growth or value, or that are in or not in particular sectors or industries.

As with a prospector's search for gold or gems, it is essential that you know what you're looking for. Define your objectives clearly, as they will direct your search.

Always keep in mind that screening is only a starting point and must be followed by solid analysis of the companies unearthed.

The screenshot shows the MyStockProspector.com website. At the top, there's a navigation bar with links: Home, Define Criteria, Define Report, View Results, My Saved Screens, Pre-Defined Screens, and Help. Below the navigation bar, the main content area is titled "Software to Help Investors Identify Specific Stock Characteristics." and features a circular flow diagram with three steps: 1. Define Criteria, 2. Define Report, and 3. View Results. Surrounding this central diagram are four panels: "Featured Screen" (Betterinvesting-Style Stocks), "What's New" (The video replay of Doug Gerlach's webinar on MyStockProspector.com is now available for viewing.), "My Saved Screens" (1. 12% Growth Companies, 2. SmallCap Ideas, 3. Small Company Growth (3 or 5 yr), 4. Small Company Growth), and "Predefined Screens" (1. Value companies, 2. Safety companies, 3. Quality companies, 4. Betterinvesting 1).

Subscribing to MyStockProspector.com

MyStockProspector.com is offered on an annual subscription basis for just \$69.99 a year. (Check the website for any special offers that may currently be available to new or renewing subscribers.) You may subscribe by visiting www.MyStockProspector.com or by calling ICLUBcentral Inc. at 1-877-33-ICLUB (877-334-2582) Monday through Friday, 9:30 AM - 6:00 PM EST.

A subscription offers unlimited use of the application with the ability to save as many personally customized screens as desired.

Running MyStockProspector.com



Once you have purchased a subscription to **MyStockProspector.com**, you may use the application by visiting www.MyStockProspector.com in your web browser and logging in using your username and password. The application has been tested on the most popular web browser programs and operating systems, including tablets and netbook computers. It has not been optimized for mobile phones, however. As these standards change, however, the site may not be completely functional in various operating systems or web browsers, or your browser or computer's security settings may not allow the full functionality of the website.

MyStockProspector.com Data

MyStockProspector.com uses a database with ten years of financial histories for publicly-traded companies on U.S. and Toronto stock exchanges provided by Morningstar. This is the same data used by StockCentral.com and BetterInvesting for their online tools and for users of the Toolkit 6 stock analysis software. Only operating companies are included in the database; exchange-traded funds and other investment companies are not included. All data, including stock prices, is updated weekly and automatically. Data is included in a **MyStockProspector.com** subscription; no other data can be used with the website. Use of the website and the data is governed by the Terms of Service as defined on the **MyStockProspector.com** website.

Customer Support

If you need assistance using **MyStockProspector.com**, or have trouble logging on to the website, first check the **Help** menu on the website. Here you'll find solutions to common problems.

This guide is another useful resource. Use the Search function in your PDF reader program to search for applicable help within this guide.

Another great source of tips and insights is the **ICLUB Insider**, our email newsletter, which frequently includes information on all of our tools including **MyStockProspector.com**. Subscribe or view the archives at www.iclub.com/clubs/newsletter.asp.

If you can't find what you're looking for on our website, fill out our online support form (www.iclub.com/support/request.html), and one of our Support Specialists will reply to your question quickly. Remember to have in hand:

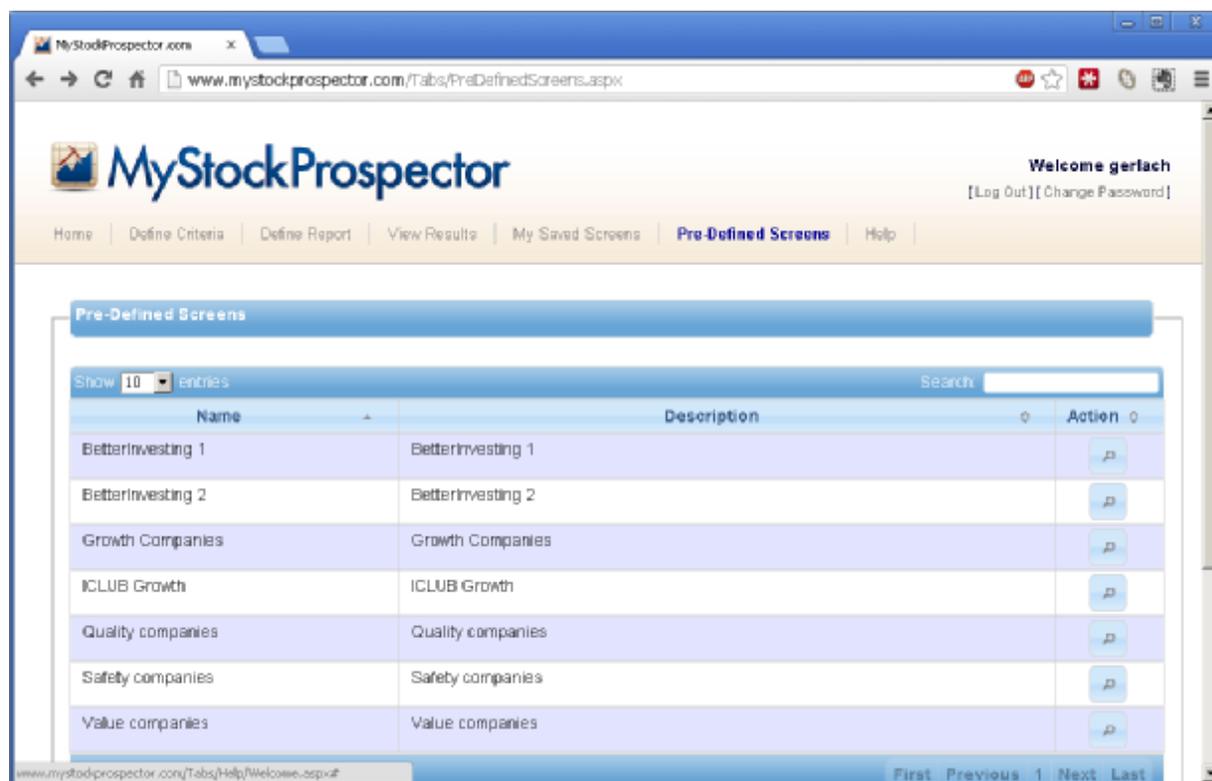
1. Precise wording of any error messages displayed on screen.
2. The operating system and browser, including version numbers, of your computer.

Finally, you may also get help by calling ICLUBcentral Inc. at 1-877-33-ICLUB (877-334-2582) Monday through Friday, 9:30 AM - 6:00 PM EST.

Screening for Beginners

Pre-Defined Screens

The easiest way to get started using **MyStockProspector.com** is to use the **Pre-Defined Screens** that are provided for your convenience.



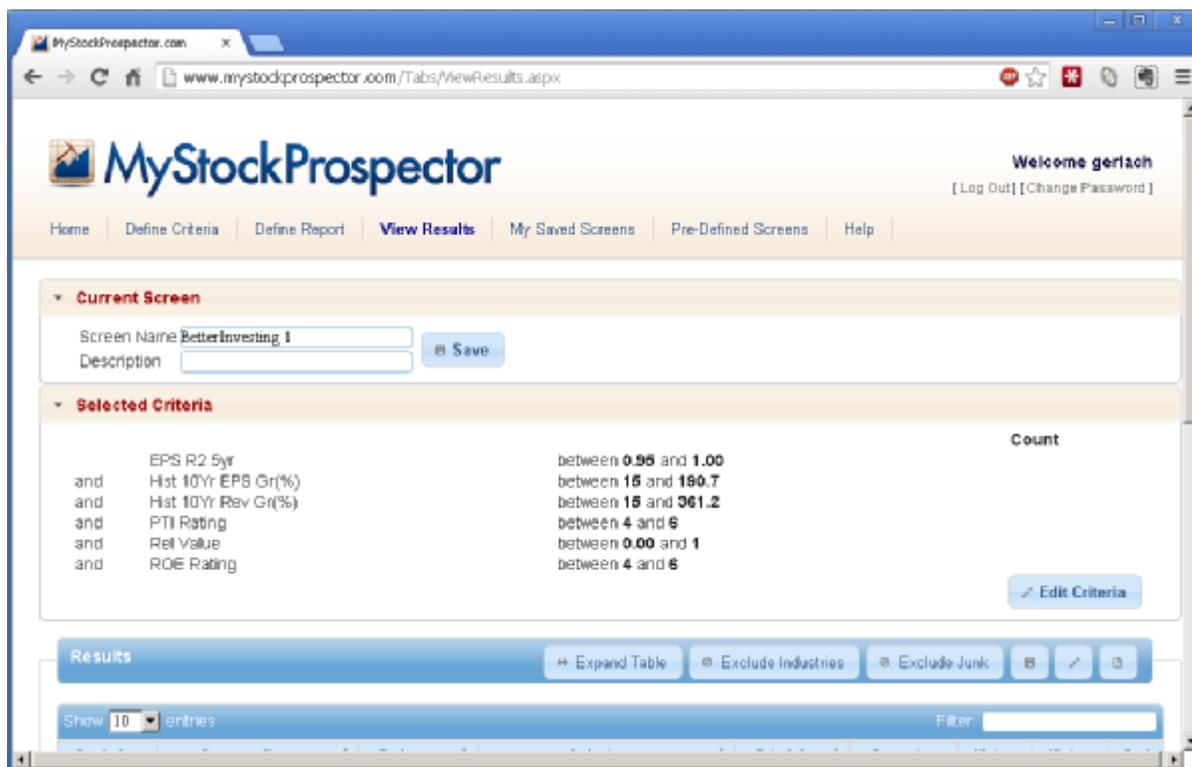
Click **Pre-Defined Screens** from the **MyStockProspector.com** menu bar to search using one of these screens. **MyStockProspector.com** includes seven pre-defined sets of screening criteria:

- **BetterInvesting 1:** Companies that fit BetterInvesting standards of high and stable long-term growth, stable or growing profit margins and returns on equity, and reasonable values.
- **BetterInvesting 2:** A search that uses Phil Keating's growth screen methods, seeking companies with high five-year historical and projected EPS growth, low historical PEG ratios, and high projected total returns.
- **Growth Companies:** Companies with high and stable five-year historical EPS and revenue growth, high projected EOS growth, and attractive valuations.
- **ICLUB Growth:** High-quality companies with consistent EPS and revenue growth at rates faster than other companies in their industry groups.
- **Quality companies:** Stable growing companies with stable or growing profit margins and returns on equity.
- **Safety companies:** Companies with low betas, high dividend growth, and strong, stable EPS and revenue growth.
- **Value companies:** High, stable growth companies with low valuations.

To view results of one of these screens, click the magnifying glass icon in the **Action** column.

After you have displayed the results of a search, click **Selected Criteria** to display the items used to define the screen.

Click the **Edit Criteria** button in the Selected Criteria section to personalize the results, if desired.



Viewing, Sorting, and Customizing Results

Once you have displayed the results of a screen, you can refine the information displayed in several ways.



The **Results** bar offers several options:

- **Expand Table:** Expands the results table to fit your browser window. This is useful for results that include a lot of information. Once clicked, the button changes to read **Shrink Table**. Click it again to restore the table to its original fixed width.
- **Exclude Industries:** MyStockProspector.com allows you to utilize Industry Averages in searches, to pinpoint fast growing or low-valued industries, for instance. If your results include Industry records, click this button to remove them from the results.
- **Exclude Junk:** The **Junk Screen** used to identify companies you consider to be “junk,” such as penny stocks or companies with no earnings. You must set up your personal Junk Screen in **My Saved Screens** before using. Once defined with your personal criteria, the Results display of any search will offer you the opportunity to Exclude Junk from your results by clicking the button. Click again to **Include Junk**.
- **Save:** Click the small floppy diskette icon to save any criteria for future use.
- **Edit:** Click the pencil to edit the current criteria.

- **Export:** Click the document icon to export the results in *.CSV format, readable in Excel and other applications.

Symbol	Company Name	Industry	Subsect	Current Price	Hist 10Yr Rev Gr	Hist 10Yr EPS Gr	Trend	Rel Value	PF	EPS
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The dropdown list in the table header allows you to show between 10 and 100 **Entries** in the results table.

Navigate to the next and previous screens of results using the **First/Previous/Next/Last** links in the bottom right of the table.

The **Filter** box in the table header allows you to temporarily limit the display of results. Enter any set of letters in the field and press the Enter key on your keyboard to filter out any results that don't match. This is useful for quickly finding a single company in a large set of results.

Click the **small arrows** in any table header to sort that column by ascending order. Click again to resort in descending order.

As you move your mouse over a row in the Results table, that row is highlighted in yellow and a small popup is displayed with the company's name

Symbol	Company Name	Industry	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	Trend	EPS R2 10yr	Rel Value	Institutional Holdings(%)
COH	Coach, Inc.	Luxury Goods	15.4	19.1	Even	0.94	0.93	93.4
LTM	Life Time Fitness, Inc.	Leisure	15.7	13.5	++	0.91	1.04	31.2
ORCL	Oracle Corporation	Software - Infrastructure	16.7	18.8	Even	0.99	1.02	60.4
BRJ	Bio-Reference Laboratories	Biotechnology	21.4	22.0	Even	0.97	0.99	97.3
FFIV	FFIV Networks, Inc.	Software - Infrastructure	25.6	26.6	++	0.95	1.05	97.8
HDB	HDFC Bank Ltd	Banks - Regional - Asia	31.2	22.9	++	0.95	0.86	15.8
ISRG	Intuitive Surgical, Inc.	Medical Devices	36.6	38.9	Even	0.93	0.85	92.8
AAPL	Apple Inc	Consumer Electronics	40.6	65.3	+	0.96	0.96	61.3
GMCR	Green Mountain Coffee Roasters, Inc.	Packaged Foods	53.1	58.4	++	0.95	0.88	88.5

Double-click with your mouse anywhere on a row to display the **Quick View Graph** of that company's historical growth.

The graph includes up to ten years of a company's sales (in green), earnings per share (in blue), and annual high and low prices (in black). The current share price is marked in red on the current year. The annualized growth rate of sales and EPS are included at the bottom of the graph.

Use the navigation arrow keys at the top left of the graph to go to the first record in the results list, move back one record, move forward one record, or go to the last record in the results.

Click the **Print** button to print the graph.



Defining Reports

One of the powerful features of **MyStockProspector.com** is the ability to add additional fields to the table of results. By default, all of the fields used to construct the search are displayed in the results, but you can reorder them and add additional fields that provide additional information.

For instance, you can view the Industry of every company in the results by adding that field using the **Define Report** function. You will learn more about defining reports in the next section.

Screening for Advanced Users

The advanced operation of **MyStockProspector.com** permits full customization of the search process. The application uses a three-step system to help you identify stocks for consideration:

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



Define Criteria

Before you begin using a tool like **MyStockProspector.com**, you should have a clearly defined objective for the kind of companies you want to find for your portfolio. The purpose of the **Define Criteria** section is to establish the conditions (criteria) you wish to use in searching your companies. These definitions will filter the database for the kind of companies you seek.

Until you are proficient with defining criteria statements, you will probably want to use the **Pre-Defined Screens** as a basis for your searches. The results of your screen will be displayed in a report that can be sorted and individual companies can be viewed.

What Are Your Search Objectives?

The search for companies is based on the criteria statements used. Criteria for the companies should define the characteristics of interest to you. These criteria will vary depending on your investing objectives. Here are some examples of search objectives:

1. Companies in a particular industry or industry group.
2. Companies of a particular size (small, medium or large, by market capitalization or sales).
3. Companies with the highest income (dividends).
4. Companies with the best management (through consistency in growth, profitability, or invested capital).
5. The fastest growing companies.
6. Companies whose recent results exceed the average of the industry, industry group, or whole of the database.

7. The best performing industries.
8. Companies that meet BetterInvesting's investment criteria.

Although we don't advise it, aggressive and knowledgeable investors could search for:

1. Possible turn-around situations.
2. Potential buy-out candidates.
3. Short selling situations.

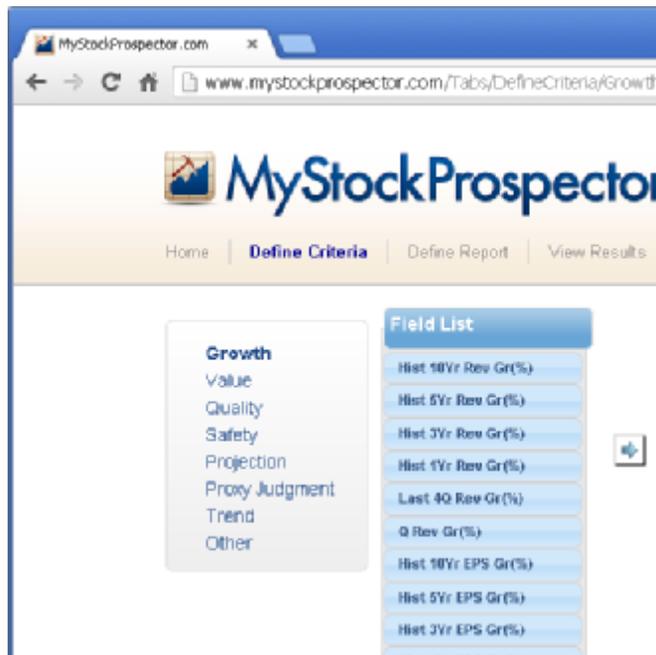
The capabilities of the **MyStockProspector.com** application are very extensive. Your knowledge defines the criteria to discover companies appropriate for your type of investing.

Creating a New Search from Scratch

The **Pre-Defined Screens** can be used as starting points for new criteria. We suggest that you review the **Defined Screens** to understand how each achieves its objective. You can then modify these pre-defined criteria and specify variations to suit your purposes.

To create a new search, click **Define Criteria** on the **MyStockProspector.com** menu. The **Define Criteria** window has three parts. On the far left are the **Data Groups**. There are eight data groups, each with items that pertain to that group. These collections make it easier for advanced users to find and use specific items for their searches and reports. The following groups are available:

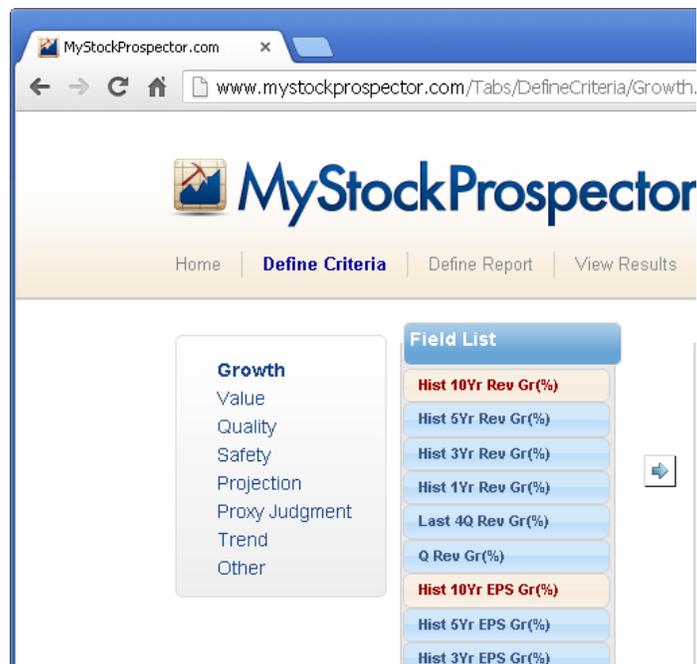
- **Growth** items deal with anything that has a growth component: revenue, EPS, dividends, etc. For several items the growth is calculated over different length periods. You could use these periods to determine improvement/deterioration of growth by comparing a longer growth period to a shorter growth period.
- **Value** items include the current price in some form in their calculation. Typical items are P/E ratio, relative value, etc.
- **Quality** items measure management's achievements. These include profitability, ROE (return on equity) and their trends, as well as the consistency of growth items (R^2).
- **Safety** items help determine a company's stability. Items that describe the size of the company, financial liquidity, and volatility fall into this group.
- **Trend** items are derived from the most recent data and are compared to older data. This is done for revenue, EPS, and price and the comparison is made to the company's own trend, to companies in the industry, and to all the companies in the database.
- **Projection** items are based on information that may be provided by analysts.
- **Proxy** items are computer calculations simulating BetterInvesting/Toolkit 6 methods for items such as upside/downside ratio, buy/sell zones, total return etc. These items should be used carefully as they may not be appropriate. Normally, these items are derived from a process where the investor imparts an understanding. The computer calculations have no similar capability.
- **Other** items describe the company and data that are normally not used for screening. These items cannot be assigned weights and are designated with "N/A."



See the **Appendix** for a complete list of all data fields in the application by data group.

To begin to build a search, first select a **Data Group** (such as **Growth**). The **Field List** of items included in that group are displayed to the right of the groups. As you move your mouse over an item in the list, a popup definition of that item will appear.

Next, click with your mouse on one or more of the fields in the **Field List**. Selected fields are highlighted.



After selecting one or more fields, click the **Arrow** button to add them to the **Selected Fields** section.



You will notice that the toolbar changes at the top of the screen to provide additional functions: **Start Over** to erase the current search and begin another, **Report Fields** to define the fields show when results are displayed, **Results** to display the results of the search, and **Pin Toolbar** to eliminate the toolbar animation when moving between sections and fix it in place on the screen.

On the right side, the **Field Totals** button shows the number of companies that meet each criteria individually in the **Record Count** column of the Selected Fields, while the **Running Totals** button shows the number of companies that meet all successive criteria in the list.

To delete criteria, click the round button on the far right side of any row; the button is then highlighted, and clicking **Delete Marked Items** will remove them all from the search. Click **Select All** to choose all the criteria in the list; click **Delete Marked Item** to remove them all.

For each field added to the search, the minimum and maximum values for that field of all companies in the database are displayed in the boxes and in smaller numbers below the sliders. (These numbers may often seem unusually high or low, but remember that these values are calculated mathematically from the financials without regard to any adjustment for irregular events.)

To set your own minimum and/or maximum values, use the **slider** to adjust the values. You may also manually type values into the fields. Note that the fields expand as you move your mouse over them to allow you to type in larger numbers than might be otherwise accommodated by the size of the fields.

Click **Running Totals** to see how many companies meet your entered criteria.

In the following example, there are 1265 companies that have a minimum 10-year historical revenue growth rate of 15%. With **Running Totals** selected, there are 220 companies that meet that condition and also have 10-year historical EPS growth rates of 15% or more.



When you have finished defining your criteria, click **Results** on the toolbar or **View Results** on the menu to see the companies that have passed muster. You can view results at any point and return to add or remove criteria if necessary.

Saving Screens

Once you've created a screen that you wish to use in the future, you can save it in your account. Later when you access that screen, the same criteria will be used to search the then-current database, helping you to find new companies to study.

To save a screen, click the **Current Screen** menu bar or the **Save** icon on the toolbar. Give the screen a name and (optionally) a description. The application will prompt you to overwrite an existing screen if you enter a name that already is in use.



▼ **Current Screen**

Screen Name

Description

The screen will now appear in your **My Saved Screens** list:



Home | Define Criteria | Define Report | View Results | **My Saved Screens** | Create New Screens | Help

My Saved Screens

Name	Description	Action
15% Growing Companies		
15% growing companies -	large cap, high growth	
Small Company Guide		

Define Report

By default, any search created from scratch includes all of the fields used in the search in the display of results. However, **MyStockProspector.com** allows you to add additional fields to the results, or to reorder the fields so they appear in a more organized fashion.

After you have built a search, click **Define Report** to customize the results.

The same **Data Groups** and **Field Lists** are used here as in the **Define Criteria** section of the application. To customize a report, select a **Data Group** (**Growth**, **Value**, **Other**, etc.) on the left, then select one or more fields from the **Field List**. The fields will be highlighted.



Start Over | Report Fields | Results | **Pin Toolbar**

Field List

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

Symbol

Exchange

Industry

Sector

SIC No

Date Info

Last Quarter Date

Price Last Updated

Current Price(\$)

52W Hi Price(\$)

Selected Fields

Company Name (mandatory field)

Sales(\$)

Hist 5Yr Rev Gr(%)

Hist 5Yr EPS Gr(%)

EPS R2 3yr

PE / Hist EPS Gr

ROE Rating

P11 Rating

Inside Ownership(%)

Institutional Holdings(%)

Click the **Arrow** to add those fields to the **Selected Fields** list. Newly added fields are placed initially at the bottom of the list.

You can reorder the selected fields by clicking and dragging them to the desired place in the list. Release the mouse button to drop the item onto its desired location.



When you have finished customizing the Report, click **View Results** to display the company list with the new fields in place.

Advanced Functions

Junk Screen

In the bottom of the **My Saved Screens** section is the **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.

You must set up your Junk Screen before you use it for the first time. Click the Edit button to review and edit the criteria in the search. An example is below; this Junk Screen eliminates companies with share prices below \$1 or that don't trade on an U.S. stock exchange.

Condition	(Item	Criteria)	Record Count
		Exchange	in TSE; TSX; TSXV; INDUS;		3497
OR		Current Price(\$)	0 1.00		3706

Conditions and Nested Conditions

By default, the **Condition** for each search criteria entered is “AND.” This means that the companies included in the final running total record count and results set will have passed all of the criteria entered. Other supported conditions include AND NOT, OR, and OR NOT.

Another advanced function is the ability to “nest” conditions. In this way you could find companies that meet one set of criteria out of two or more sets of criteria. In the header, you will note two parentheses: an “**open parenthesis**” between **Condition** and **Item** and a “**close parenthesis**” between **Criteria** and **Record Count**. In each row of the table, there is also a slim white box below each parenthesis. Click the box to add an opening or closing parenthesis to group your criteria. The application will alert you if your logic is not acceptable.

In the following example, an initial search is conducted for companies that have 10-year historical EPS growth rates of 15% or more AND have an EPS R² of 0.9 or higher. Since there may be companies that have only nine years of data in the database (and thus don't appear in the results) but that may be acceptable, the second set of criteria identifies companies that have 9 years or less of data, historical 5-year EPS growth of 18% or more (since we expect higher growth from newer companies), and a EPS R² of 0.9 or higher.

The screenshot shows the search interface with the following criteria and record counts:

Condition	Item	Criteria	Record Count
	(EPS R2 10yr	0.9	102
AND	Hist 10Yr EPS Gr(%)	15	102
OR	(Hist 5Yr EPS Gr(%)	18	1234.2
AND	EPS R2 5yr	.9	102
AND	Num Yrs of Data	0.00	129

With Running Totals selected, there are 102 companies that meet that condition and also have 10-year historical EPS growth rates of 15% or more, but an additional 22 have less than 10 years of history but meet our minimum criteria for consistent growth of 18% or more in EPS over the last five years, for a total of 129 companies that meet one or the other of the criteria sets.

Industry Average & Other Field Comparisons

One powerful feature of **MyStockProspector.com** is the ability to search by comparing a company's values in any field to the industry average of that field, or to the industry average of any other field in the database. For example, because profit margins vary widely by industry group, it makes much more sense to search for companies that exceed the average profit margins for their own industries instead of restricting your search to companies that have a profit margin above some arbitrary figure such as 20%.

To use this feature, right click with your mouse in the minimum or maximum boxes of any criteria. A small popup window will display, allowing you to choose to use **Industry Average - Current Field**, **Industry Average - Other Fields**, or **Other Fields**. In the following example, only companies that have 10-year EPS Growth rate that are higher than the average 10-year EPS growth rate of companies in their industry groups will pass the screen.

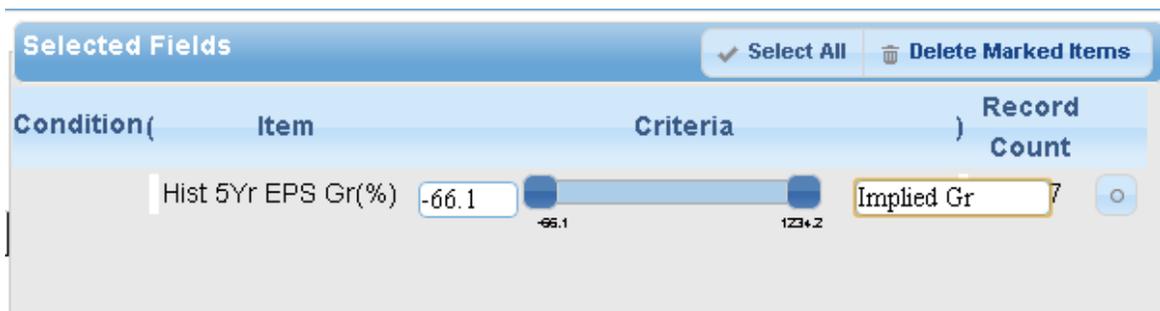
The screenshot shows the search interface with a popup menu for the 'Hist 10Yr EPS Gr(%)' criteria. The popup menu options are:

- Ind Avg - Current Field
- Ind Avg - Other Fields
- Other Fields

The **Industry Average - Other Fields** option works similarly, but allows you to compare a field to the industry average of any other field in the database. Select this option and a list of database fields appears for you to choose from.

The **Other Fields** option allows you to compare any database field to any other database field. Right click in the minimum or maximum criteria box, select Other Fields, then select a value from the popup list of all

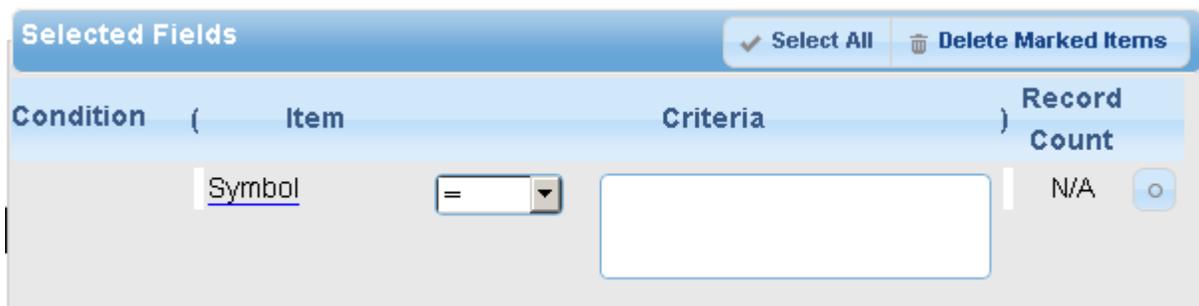
fields in the database. For example, you could search for companies whose historical 5-year EPS growth rates are below their Implied Growth Rates, as in the following example.



Text Database Fields

Some of the fields in the database are not suitable for numeric comparisons. For instance, the **Industry Group**, **Sector**, **Company Name**, **Symbol**, and **Exchange** are all text fields. However you can still search using these fields, isolating companies in a particular sector, or eliminating stocks that trade on non-U.S. stock exchanges, for example. You might also enter the ticker symbols of all of the companies that you currently own in order to build a comprehensive report of their current statuses, or add your current holdings to a search (using OR as described in the nested conditionals section above) in order to see how the newly discovered companies compare to your present portfolio.

When you add these fields to the criteria list, a different set of operators appears: =, != (not equals), IN, and NOT IN. A large text box also appears in place of the slider control. These allow you to build even more powerful searches.



To search using these fields, click in the **Criteria** box and begin to type the value you wish to include or exclude. The application will immediately begin to search for the text that is being entered and suggest possible items.



Select the item from the list, or complete typing it in manually. Separate each item with a semi-colon character.

Industry Averages

Using **MyStockProspector.com**, you can display key averages for all industry groups included in the database (approximately 146). With this feature, you can find industries of interest to study or discover the averages of key ratios for comparison with other companies under study. The database includes industry averages for all 121+ fields in the database. (Note that some of these industry averages may not be meaningful, even though you can search on all of them.)

To use this feature, select the **Exchange** field from the **Other** data group. Then, right-click with your mouse in the **Criteria** box and type **INDUS**. This is the special indicator used to represent the industry average records in the database.

Click **Define Report** to select the fields that you wish to appear on the results screen. Values such as the **average 5-year pre-tax income percentage** and **debt/equity ratio** are especially useful on this report. Click the **Results** button or **View Results** to see the industries.

Show 10 entries

Company Name	Hist 10Yr Rev Gr(%)	Hist 10Yr EPS Gr(%)	Hist 5Yr EPS Gr(%)	EPS R2 10yr	EPS R2 5yr	Num Yrs of Data	Implied Gr(%)	Symbol	Exchange	Industry	Se
Advertising Agencies	6.2	1.3	2.6	0.77	0.21	7	29.0		INDUS	Advertising Agencies	Consur
Aerospace & Defense	10.7	6.5	7.5	0.71	0.44	10	13.6		INDUS	Aerospace & Defense	Industr.
Agricultural Inputs	4.8	0.0	5.2	0.00	0.25	7	22.3		INDUS	Agricultural Inputs	Basic I
Airlines	12.3	2.1	2.0	0.57	0.28	9	30.5		INDUS	Airlines	Industr.
Airports & Air Services	5.3	7.8	17.1	0.09	0.40	9	9.5		INDUS	Airports & Air Services	Industr.
Aluminum	4.5	0.0	0.0	0.00	0.04	8	14.8		INDUS	Aluminum	Basic I
Apparel Manufacturing	9.1	4.1	6.7	0.53	0.39	9	18.4		INDUS	Apparel Manufacturing	Consur
Apparel Stores	7.1	5.2	11.8	0.43	0.61	9	16.8		INDUS	Apparel Stores	Consur
Asset Management	6.2	1.2	2.9	0.39	0.33	7	19.0		INDUS	Asset Management	Financi
Auto & Truck Dealerships	5.8	3.4	8.1	0.34	0.59	9	11.2		INDUS	Auto & Truck Dealerships	Consur

Showing 1 to 10 of 146 entries

First Previous 1 2 3 4 5 Next Last

Note that rows that represent an industry are dark red and italicized. Because the industry records and the company records are maintained side-by-side in the database, you may occasionally return an industry record in your company searches. When that happens, just click the **Exclude Industries** button on the toolbar. You might also include industry records in your **Junk Screen** so that they would be removed whenever you “excluded junk” from your searches.

PTI and ROE Trend Fields

Unique to MyStockProspector.com is the ability to search using the trend of a company’s five-year percentage pre-tax income margin (**Trend PTI**) and percentage return on equity (**Trend ROE**), available in the **Quality** data group. When you select these items, a different screen appears in the Selected Fields window:

The screenshot shows the 'Selected Fields' window with two items: Trend ROE and Trend PTI. The 'Criteria' column for each item contains a set of buttons: ++, -+, +, Even, +-, -, and --. The 'Record Count' column shows 'N/A' for both items. A dropdown menu is set to 'AND'.

Condition	Item	Criteria	Record Count
	Trend ROE	++ -+ + Even +- - --	N/A
AND	Trend PTI	++ -+ + Even +- - --	N/A

These two fields derive from BetterInvesting’s Stock Selection Guide and Toolkit 6’s Stock Study form, in Section 2. The application reviews the trend of a company’s five-year pre-tax profit margins and returns on equity and assigns a value. If the values are relatively constant over the past five years, then the trend is Even. Companies that have seen the highest levels of margin or ROE expansion in the period have a rating of “++”. On the downside, the lowest-performing companies have a rating of “--”. In between, companies are ranked accordingly.

Since it is usually preferable to invest in companies with stable margins and ROE, this feature allows you to identify high-quality companies by eliminating companies with potential margin problems, for instance. To use these fields, simply click on the rankings to select the values you wish to use:

The screenshot shows the 'Selected Fields' window with two items: Trend ROE and Trend PTI. The 'Criteria' column for each item shows the selected criteria: ++, -+, +, and Even are highlighted in red. The 'Record Count' column shows 4296 for Trend ROE and 3508 for Trend PTI. A dropdown menu is set to 'AND'.

Condition	Item	Criteria	Record Count
	Trend ROE	++ -+ + Even +- - --	4296
AND	Trend PTI	++ -+ + Even +- - --	3508

Exporting Data

Click the **Export** button on the toolbar to download a copy of any search results in *.CSV format. This is a text-based format where the values are separated by commas, and can be read in Microsoft Excel and other spreadsheet programs.

	A	B	C	D	E	F	G	H	I	J
	Company Name	Sales(\$)	Hist 5Yr Rev Gr(%)	Industry	Hist 5Yr EPS Gr(%)	EPS R2 5yr	PE / Hist EPS Gr	RCE Rating	PTI Rating	Inside Ownership(%)
1	American Public Education, Inc.	260.377	0.3865	Education & Training Services	0.3649	0.9962	0	3	3	0.03
2	Bank of the Ozarks, Inc.	285.817	0.295	Banks - Regional - US	0.3336	0.9972	0.8622402	6	6	0.062
3	Capella Education Company	430.043	0.1891	Education & Training Services	0.305	0.5875	0	6	4	0.0
4	Dim a Community Bancshares, Inc.	147.431	0.1745	Savings & Cooperative Banks	0.2035	0.9005	-1.431159	6	6	0.063
5	DTS, Inc.	96.922	0.1703	Software - Application	0.2051	0.9834	3.182285	6	5	0.019
6	Encore Capital Group, Inc.	467.371	0.1756	Credit Services	0.4203	0.9735	1.025838	6	6	0.062
7	Enghouse Systems Limited	122.559	0.2423	Software - Application	0.3233	0.9954	4.971991	6	4	
8	HMS Holdings Corporation	363.826	0.2602	Business Services	0.3088	0.9809	0	4	6	0.015
9	Home Capital Group	368.834	0.1833	Savings & Cooperative Banks	0.2265	0.8796	0.3192363	4	6	
10	Logic Software Enterprises	113.328	0.1832	Software - Application	0.7131	0.9972	0	6	6	
11	Main Street Capital Corporation	66.24	0.5047	Asset Management	0.6763	0.8771	0.1446843	6	6	0.129
12	Medfast, Inc.	298.189	0.4095	Specialty Retail	0.5456	0.7028	1.271256	6	4	0.121
13	Mercadolibre, Inc.	298.932	0.3459	Business Services	0.6873	0.9778	0	6	6	0.107
14	Mistras Group, Inc.	436.875	0.2956	Engineering & Construction	0.3119	0.9734	0.8644437	5	6	0.456
15	Neogen Corporation	184.046	0.1673	Diagnostics & Research	0.1685	0.676	2.504787	2	4	0.05
16	NIC, Inc.	180.839	0.2174	Software - Application	0.1747	0.999	0	6	5	0.064
17	Paladin Labs, Inc.	141.466	0.2283	Drug Manufacturers - Specialty & Ge	0.6916	0.94	0	6	6	
18	Sturm, Ruger & Company	328.816	0.2003	Aerospace & Defense	0.5296	0.8031	0.4843137	6	6	0.042
19	United Financial Bancorp, Inc.	62.166	0.1547	Banks - Regional - US	0.2789	0.8892	2.391847	6	4	0.031
20	Zuoan Fashion Ltd.	190.303	0.3242	Apparel Manufacturing	0.2378	0.9514	0.06837679	2	3	
21										
22										
23										
24										
25										

Note that the numeric values are not formatted in the file (15.1% is displayed as 0.151). You can use the formatting options in Excel to adjust the number of decimal places and numeric displays in the results if you so desire.

Also note that the export function is limited to 400 companies and 60 columns of data. If your search results include more companies or fields than this, you will be alerted to adjust your search criteria and your results will be truncated.

Data Items

The following is a description of the data used in **MyStockProspector.com** for searches and defining reports.

Company Name	Company name.
Symbol	Trading symbol.
Exchange	Trading exchange.
Industry	This is the industry name.
Sector	This is the sector name.
SIC No	Standard Industrial Classification number.
Last Full Yr	Last year of data, the fiscal year. This is the year of the last full year of data.
Date Info	Date when database was generated.
Last Quarter Date	Date of the last reported quarter in the database.
Current Price	Current share price for the date indicated in "Price Last Updated."
Price Last Updated	Typically the date of the last share price update, or when database was generated.
52W Hi Price	Highest share price reached during the last 52 weeks.
52W Low Price	Lowest share price during the past 52 weeks.
Current EPS	Current earnings per share – Total of last 4 quarters of reported earnings.
Current Div	Current indicated annual dividend.
Num Yrs of Data	Number of years of sales data available for the company.
Inside Ownership	Percent ownership by directors and management of the company.
Institutional Ownership	Percent ownership by pension and mutual funds and professional managers.
Hist 10Yr Rev Gr	Historical 10-year growth for revenues. Calculation uses the yearly data and a least-squares calculation to determine past growth. Long term growth rate.
Hist 5Yr Rev Gr	Historical 5-year revenue growth.
Hist 3Yr Rev Gr	Historical 3-year revenue growth.
Hist 1Yr Rev Gr	Historical 1-year revenue growth.
Q Rev Gr	Quarterly revenue growth. Growth of quarterly revenues compared to the same period a year earlier. Current growth rate. Compare this with the last 1 or 3 year growth to determine consistency.
Last 4Q Rev Gr	Latest 4 quarters revenue growth. Growth of moving 4 quarter revenues compared to the similar period a year earlier. Current growth rate. Compare this with the last 1 or 3 year growth to determine consistency.
Hist 10Yr EPS Gr	Historical 10-year growth for EPS. Uses a least-squares calculation to determine EPS growth. Long term growth rate.
Hist 5Yr EPS Gr	Historical 5-year growth for EPS.
Hist 3Yr EPS Gr	Historical 3-year EPS growth.
Hist 1Yr EPS Gr	Historical 1-year EPS growth.
Q EPS Gr	Growth of quarterly EPS compared to the same period a year earlier. Current growth. Compare this with the last 1 or 3 year growth to determine consistency.
Last 4Q EPS Gr	Latest 4 quarters EPS growth. Growth of moving yearly EPS compared to the same period a year earlier. Current growth rate. Compare this with the last 1 or 3 year growth to determine consistency.
Cash Flow Gr	Growth in cash flow for number of years of data available. Can be used to confirm EPS growth. In some industries (resources, cable, etc.) cash flow is a better indicator than EPS.
Div Gr	Growth in dividends for the number of years of data available. For those interested in income from investments.

Book Value Gr	Book value per share growth (common equity / number of shares). Growth in book value for the number of years available. Regulated industries (utilities) pay out a fixed amount based on their assets. Book Value is an indication of assets.
Implied Gr	The growth rate of retained earnings. An indication of future growth can be made from implied growth.
Hist Share Gr	Growth in average share price for the number of years available, based on yearly data. Comparing this to EPS growth can suggest whether PE is expanding or contracting. This can indicate whether a stock is getting overpriced.
Hist 5Yr Price Gr	Price growth based on Monthly data.
Hist 3Yr Price Gr	Price growth based on Monthly data.
Hist 1Yr Price Gr	Price growth based on Monthly data.
Current PE	Current Price/Earnings ratio.
Avg PE	Average Price/Earnings ratio for the last 5 years.
Rel Value	Relative value = Current PE / Avg PE. An indication of value based on past PE valuation.
Avg 5Yr High PE	Average high PE for last 5 years.
Avg 5Yr Low PE	Average low PE for last 5 years.
PE / Hist EPS Gr	Current PE divided by Historical EPS growth.
PE / Proj EPS Gr	Similar to PE / Hist EPS Gr but using projected EPS.
Price/Book Value	Current price divided by latest reported book value (per share).
Price/Sales	Current price divided by the latest sales per share figure. An indication of value for fast growing companies - not susceptible to accounting methods (EPS) and depreciation (BookVI).
Price/Cash Flow	Price to cash flow per share. Current price divided by the latest reported cash flow figure.
CashFlow /Share	Cash flow per share.
Cur Div Yield	Current dividend yield. For those interested in income from their investment.
Avg Div Yield	Historical average dividend yield. Calculated using the last 5 years' annual data.
Tax Rate	Average 5 year tax rate. Assess government's effect on profits.
% From 52W Hi	Current price to 52 week high price. (Will always be <= 0) Price being close to the 52 week high suggests a positive trend. This may show the company to be overpriced.
% From 52W Low	Current price to 52 week low price. (Will always be <= 0) Price being near the 52 week low suggests a negative trend.
Payback	The number of years for yearly accumulated EPS to equal current price. Generally between 6 and 10 - the lower the better. However, be suspicious of very low numbers.
PE /Avg ROE	Price of Profitability. Values less than 1 indicate good value.
Trend PTI	Trend of pre-tax income on sales. Derived by reviewing the last 2 years' PTI figures vs. the 5-year average. Profitability will vary for each industry. Item 2A in the SSG. Best to worst indicators are ++, +, -+, Even, +-, -, --.
Trend ROE	Trend of return on common equity. Derived by reviewing the last 2 years' ROE figures vs. the 5-year average. How well does management use assets (equity)? Item 2B in the SSG. Best to worst indicators are ++, +, -+, Even, +-, -, --.
Avg 5Yr PTI	Average 5-year PTI. Simple average. Pre-tax Income on Sales (i.e. profitability).
Avg 5Yr ROE	Average 5-year ROE. Simple average. Return on Common Equity.
PTI Rating	Numerical figure derived from trend (Trend PTI). The numerical equivalent of Trend PTI (which varies from 6 to 0) where ++ = 6 and -- = 0.
ROE Rating	Numerical figure derived from trend (Trend ROE). The numerical equivalent of Trend ROE (which varies from 6 to 0) where ++ = 6 and -- = 0.
EPS R ² 10yr	EPS consistency. R ² (or R squared) is the coefficient of correlation from the calculation of Hist 10Yr EPS Gr. Varies from 1 to 0 where 1 is the most consistent and desirable.
EPS R ² 5yr	EPS consistency over the last 5 years.
EPS R ² 3yr	EPS consistency over the last 3 years.

Rev R ² 10Yr	Revenue consistency. R ² (or R squared) is the coefficient of correlation from the calculation of Hist 10Yr Rev Gr. Varies from 1 to 0 where 1 is the most consistent and desirable.
Rev R ² 5Yr	Revenue consistency over the last 5 years.
Rev R ² 3Yr	Revenue consistency over the last 3 years.
Dividend R ² 10Yr	Dividend consistency over the last 10 years.
Com Equity R ² 10Yr	Common equity consistency over the last 10 years.
Inventory Turnover	Based on yearly sales and the latest inventory.
Current Ratio	Current ratio. Current assets / current liabilities. Measure of liquidity. Ratios of 2 or higher are generally considered good.
Quick Ratio	Cash / current liabilities. Measure of liquidity which excludes receivables: ratio of 1 or higher is good. Some industries which deal in cash typically have lower ratios.
Beta	Measure of price volatility in relation to the market. Could be misleading for fast-growing companies.
Price Variance	Statistical variation of yearly prices over the past 10 years.
Assets - Millions	Current assets. Indicates company size by measuring its assets.
Div Payout	Dividend payout ratio. 5-year average of ratio for dividends / EPS. An indicator of safety of dividends paid. For most industries look for 60% or less. Exceptions are utilities.
Int Coverage	Interest coverage. The ratio of pre-tax income to interest paid on all debt. A ratio of 3 or larger is good.
Captlztion - Millions	Capitalization is calculated by multiplying the number of shares times the current price. Indication of the company size by market valuation.
Sales	Latest sales figure. Indication of the company size by sales (revenue).
Debt /Equity	Debt to equity ratio. Measure of long term debt for company. For most industries 30% is acceptable. Utilities typically have high ratios.
Avg Debt/Equity	Average debt to equity over the last 5 years.
Debt Equity Rating	Numerical figure derived from trend (Trend Debt /Equity). The numerical equivalent of Trend Debt /Equity (which varies from 6 to 0) where ++ = 6 and -- = 0. For this rating, 4 or <u>lower</u> is best.
Trend Debt/Equity	Trend of debt to equity. Derived by reviewing the last 2 years' figures vs. the 5-year average. Item 2C in the SA+ SSG. Indicators are ++, +, -, --, where + indicates an increase in debt to equity.
Debt/Capital	As Debt Equity Rating, except using the working capital.
Quality Rating	Numerical value for StockCentral.com's Take Stock Quality rating. Varies from 10 to 0, 10 being the best.
No Shares - Millions	Number of shares. Measure of possible liquidity of company.
Proxy Hi Pr	Expected high price 5 years in the future.
Proxy Low Pr	Projected low price over the next 5 years based on a statistical assessment of price variation over the previous 5 years.
Buy Below	Lowest third of the price range based on equal (33/33/33%) divisions between proxy high and low prices.
Sell Above	Highest third of the price range based on equal (33/33/33%) divisions between proxy high and low prices.
Price in Zone	The % that the current price is above the Proxy Low Pr. Zero is at the low price, 100% is at the Proxy Hi Pr.
U/D Ratio	The ratio between the current price and the Proxy Hi Price.
Price App	Compounded (annualized) appreciation from current price to the proxy high price.
Total Ret	Compounded (annualized) total return that includes price appreciation and portion contributed from dividends.
Rev Trend	Difference in % revenue change of last 4 quarters growth and the weighted growth for the company.
Rev Trend - Indus	Compares Rev Trend of the company to the Trends of the industry.

Rev Trend - DB	Compares Rev Trend of the company to the Trends of the DB.
EPS Trend	Difference in % change EPS (last 4 quarters) to weighted growth for the company.
EPS Trend – Indus	Compares EPS Trend of the company to the Trends of the industry.
EPS Trend – DB	Compares EPS Trend of the company to the Trends of the DB.
Price Trend	Difference in % price change (last 12 months) in comparison to the 5 year change.
Price Trend - Indus	Compares Price Trend of the company to the Trends of the industry.
Price Trend - DB	Compares Price Trend of the company to the Trends of the Database.
Rev Rank - Indus	Compares short term revenue growth to the average short term growth of the industry.
Rev Rank - DB	Compares short term growth to the average short term growth of the DB.
EPS Rank - Indus	Compares short term EPS growth to the average short term growth of the industry.
EPS Rank - DB	Compares short term growth to the average short term growth of the DB.
Price Rank - Indus	Compares short term price changes to the average short term changes of the industry.
Price Rank - DB	Compares short term changes to the average short term changes of the DB.
ACE 1Yr Proj EPS	Analysts' consensus EPS. Analysts' forecast of current year's (fiscal year) EPS.
Analyst 5Yr EPS	Analysts' expectations for EPS extrapolated to calculate EPS 5 years in the future.
EPS ACE Flag 1Yr	If True, it indicates that ACE 1Yr Proj EPS was provided from the data provider. If False, it was calculated by Prospector based on internal formula.
EPS ACE Flag 5Yr	If True, it indicates that Analyst 5Yr EPS was provided from the data provider. If False, it was calculated by Prospector based on internal formula.
Proj 1 Yr EPS Gr	Expected EPS growth calculated from ACE 1Yr Proj EPS
Proj 5 Yr EPS Gr	Analysts' consensus EPS growth expected over the next 5 years.
Proj EPS Revision	Calculated only during updates from datafiles. This compares previous ACE EPS to the current value and reports any changes.