Screening for Great Stocks

<http://www.stockrover.com/webinar-outline.html>

# Assess the Market

* Strength of the Market as a whole
  + Chart S&P 500
  + Look at trend and strength of trend via Simple Moving Averages

# Determine What’s in and What’s Out

* Can use key ETFs as proxies
  + Create watchlists of ETFs and chart their performance
* Look at performance of
  + Growth vs. Value
  + Small Cap vs. Mid Cap vs. Large Cap
  + Chart individual sectors

# Select Screeners and Screen

* Use different screeners and run to find candidates
* Select promising stocks via good technicals and strengthening analyst estimates
* Collect into a watchlist and optionally tag with screener source (tagging is premium feature)
  + Basic user – create separate watchlist for each screener source

# When Screening is Complete…

* Do in depth research on each candidate to research (described in next section)
* Goal is to decide whether the candidate stock is a potential buy or not

## Perform Initial Fundamental Research via Views

1. Historical Valuation View
   1. Key columns are the 5 year ranges (P/E, P/S, P/B)
2. Valuation View (expand row for ticker of interest)
   1. EV / EBDITA over time
   2. PEG Forward
   3. Cash and Debt per share over time
3. Profitability View (expand row for ticker of interest)
   1. Look at margin trajectories (Gross, Operating, Net)
   2. Look at efficiency trajectories (ROA, ROE, ROIC)
4. Growth View
   1. 5 year sales and EPS change
   2. Mouse over at Yearly Sales and EPS graphical columns
5. Grades View (Morningstar Grades)
   1. Can see grade history via row expansion
6. Income Statement View (expand row for ticker of interest for trajectories over time)
   1. Sales
   2. Net Income
   3. Shares
   4. Sales Per Employee
7. Balance Sheet View (expand row for ticker of interest for trajectories over time)
   1. Cash
   2. Intangibles
   3. Long Term Debt
   4. Equity
   5. Debt/Equity

## Do Additional Research

1. News
2. Insider Transactions
3. Go to company’s web site and look at investor relations page – especially presentations
4. And if you still like everything – read latest 10-K and 10-Q