

Stock Screener User Guide

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Revision History

Name	Date	Reason For Changes	Version
Kathleen Connell	1/26/18	First Draft - Without Screenshots	1
Kathleen Connell	2/28/18	Final Draft - With Screenshots & Updated Information	2

About This Guide

Purpose

The purpose of this user guide is to assist individuals in using our stock screener product. This manual contains all the essential information for the user to make full use of the stock screener application. This manual includes the description of the stock screener product, its capabilities, and step-by-step procedures for installation, system access, and use.

Intended Audience

This document is intended for users interested in using a stock screener application. It is intended to assist users of all experience levels to fully maximize their use of the product.

Getting Started

Hardware Requirements

In order to utilize the stock screener, there are essential hardware pieces the user needs. Here is a list of the required hardware components:

- Computer Monitor
- Internet Connection
- Keyboard
- Mouse/Touchpad
- Power Supply Unit
- Motherboard
- Storage Device

Note: Most computer/laptop systems have many of these components pre-installed with the device.

For more information on hardware, visit <https://www.lifewire.com/computer-hardware-2625895>

Software Requirements

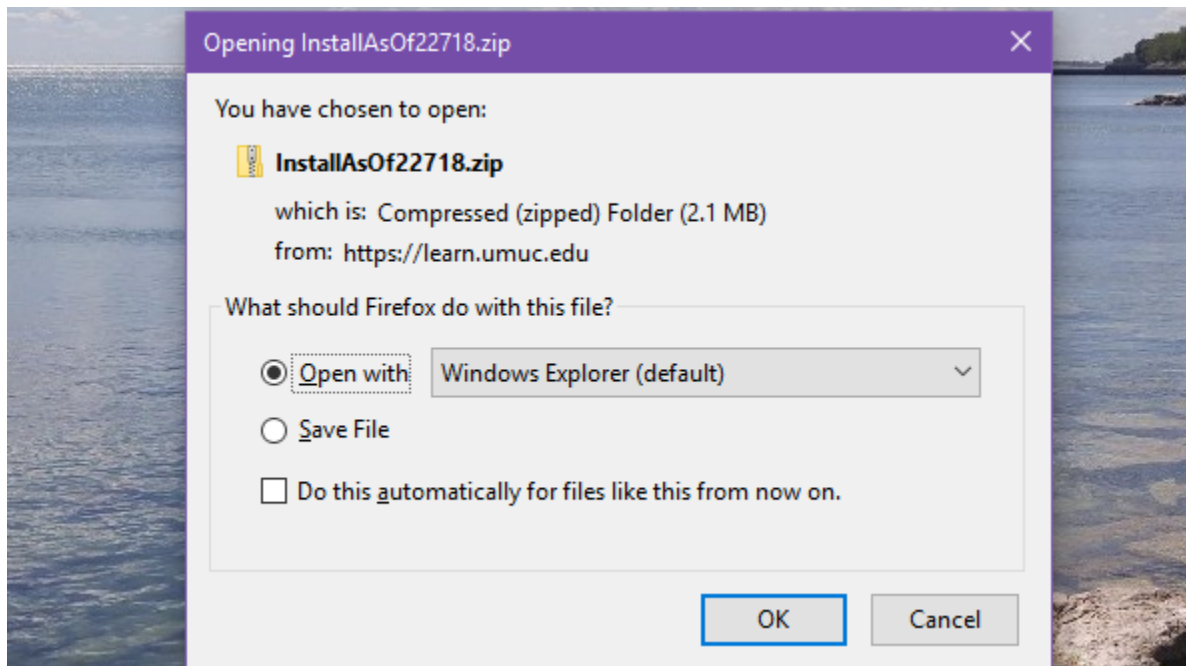
The stock screener requires specific software systems in order to install and run. For the operating system, the user must have a Windows OS. The application is only compatible with Windows Desktop Environment. While most Windows operating systems will work, it is recommended the user have Windows 8.1 or Windows 10 for easy installation.

The stock screener also requires the Windows .NET 4.5.1 Framework. Most Windows 8.1 and Windows 10 operating systems will have this software integrated into the system. Windows 7 environments will need to install the .NET framework. To install Windows .NET, please visit <https://www.microsoft.com/en-us/download/details.aspx?id=40773> and follow the necessary installation instructions.

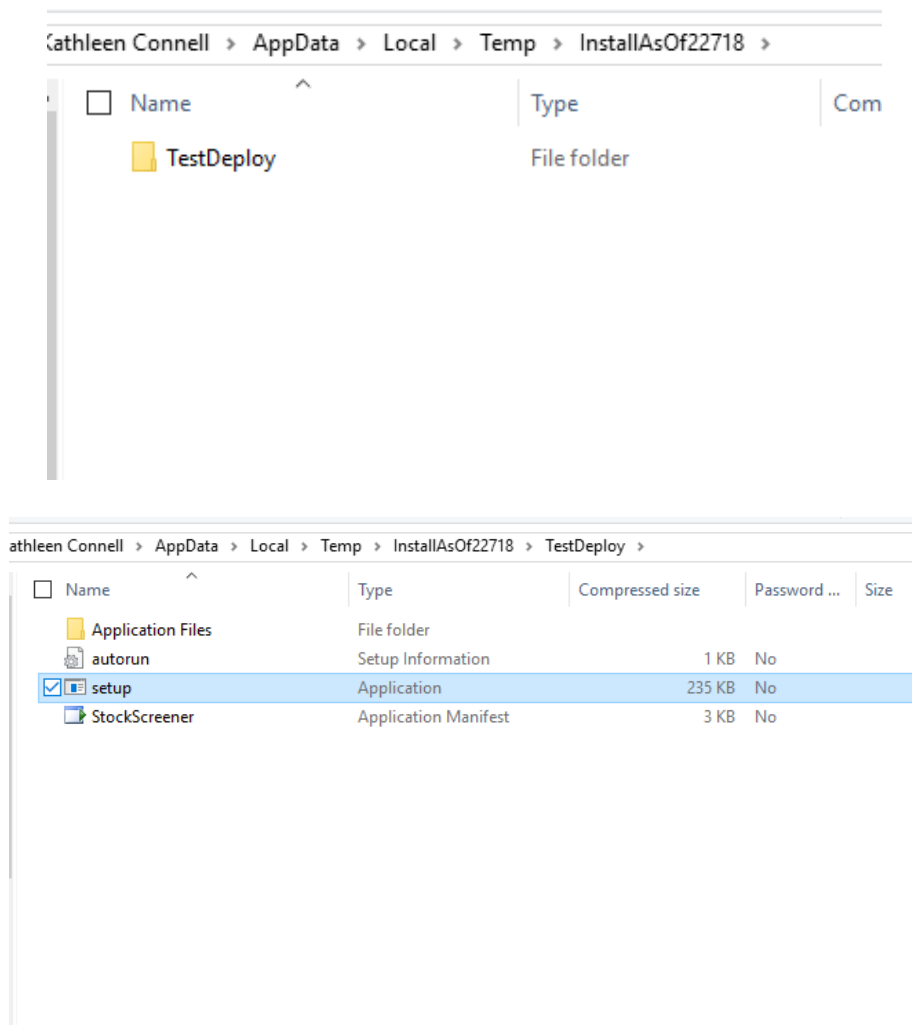
Installation

Please read the following steps to installing the stock screener:

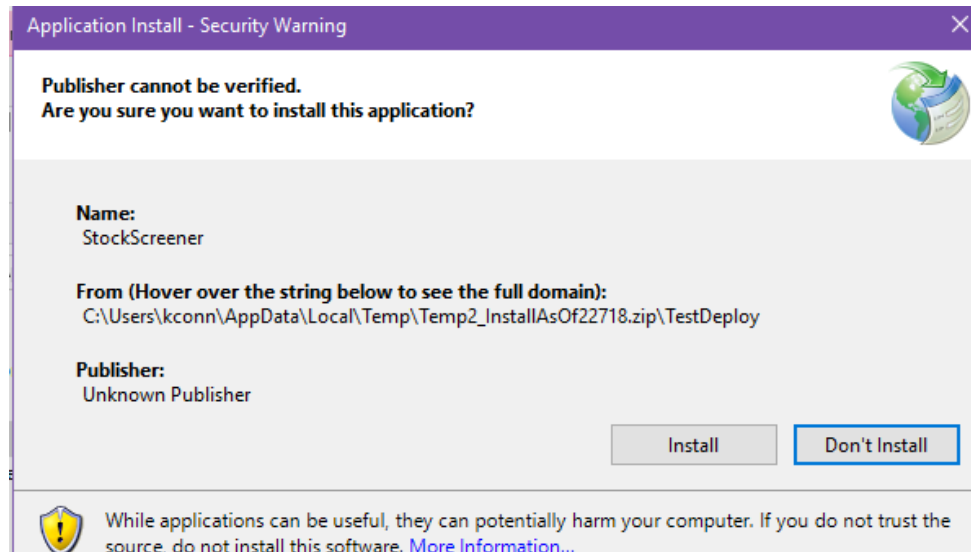
- 1) Ensure you have the required hardware/software components. Please refer to Hardware Requirements and Software Requirements of this manual.
- 2) Click on the installation zip file to download to your computer.



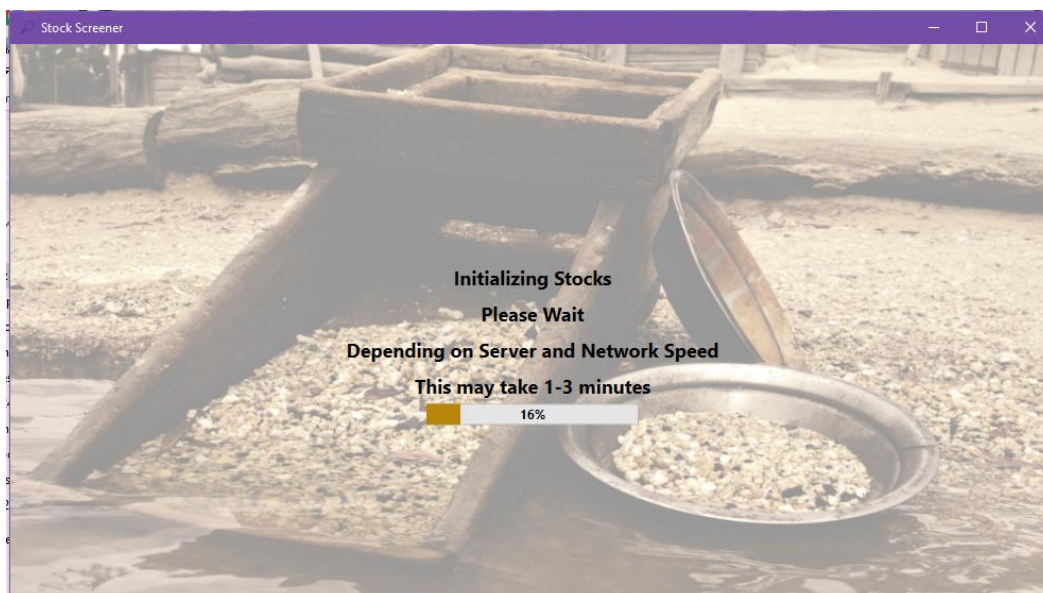
3) Open the file folder, click on the filename 'TestDeploy' and select 'setup'.



- 4) Click 'Install' to install and run the application. Your computer may alert you to running an unrecognized application. Select 'Run anyway'.



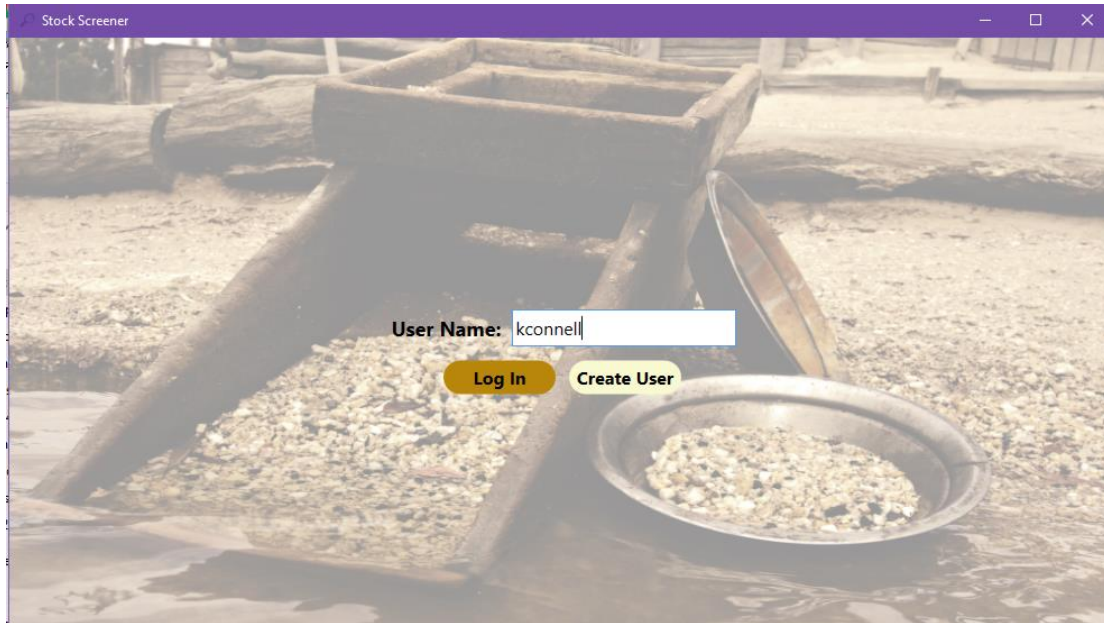
- 5) Follow along with any prompts that pop-up to complete the installation process.
- 6) Once the stock screener application is up and running, it may take a few minutes for the stock information to initialize. This is normal, and once the stock data is updated, the login window will appear.



Set Up

Creating an Account

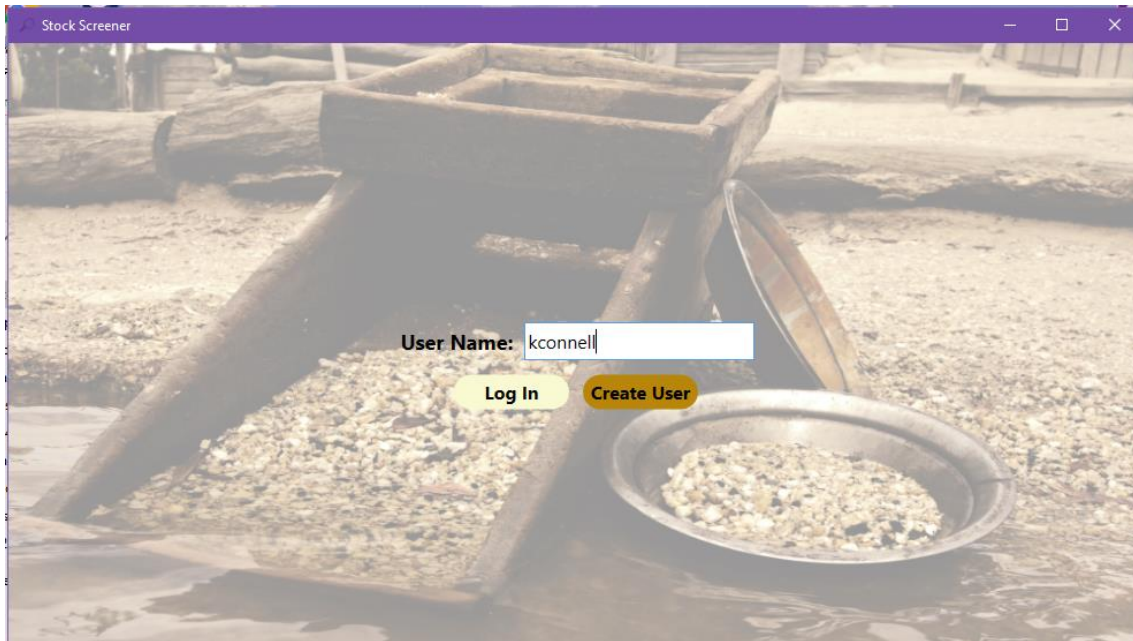
To create an account, enter your desired user name into the text box that appears on the stock screener login page.



Next, click 'Create User' to create your new account.

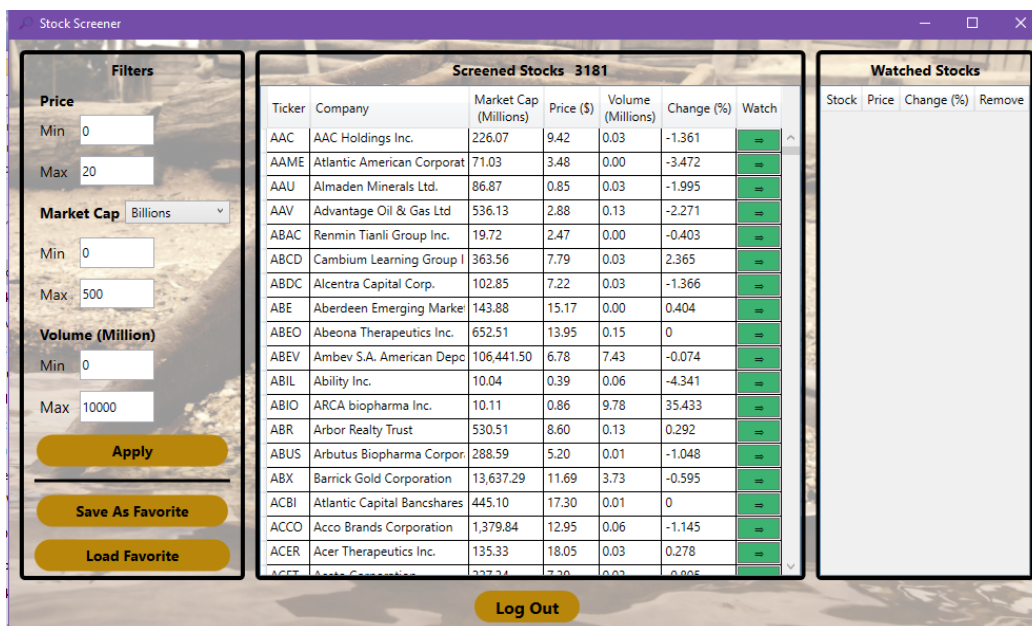
Login

To login to a preexisting account, simply type in your user name in the text box, and select 'Log In'.



If you enter a name that does not exist, a pop up message will appear alerting you that the name entered is invalid. You must enter an existing user name, or follow the instructions to creating an account.

Once logged in, the Stock Screener will be displayed on the screen.



Logout

To log out of your stock screener account, click the 'Log Out' icon located at the bottom of the stock screener home page.

Using The Product

What is a Stock Screener?

A stock screener is a tool designed to help investors and traders filter stocks based on user-defined metrics. Every stock screener has three components -

- 1) A database of stock companies
- 2) A set of filter variables
- 3) A screening engine that finds companies that satisfy the filter metrics and generates a list of matching results

Stock screeners are beneficial because they allow a user to analyze hundreds of stocks in a condensed amount of time, making it easier to weed out stocks that do not meet your requirements or investment strategy.

Terminology

Below is a list of stock screener variables and terminology:

- 1) Ticker: The Ticker is an arrangement of characters representing a particular security listed on an exchange or otherwise traded publicly. Example: AAPL is the ticker for Apple Inc.
- 2) Company: The full name of the stock company.
- 3) Price: Displays the last recent price of the stock.
- 4) Market Cap: The market value of a company's outstanding shares (in millions or billions).
- 5) Volume: The number of shares or contracts traded in a security or an entire market. during a given period of time.
- 6) Change %: The net change percentage for a given stock. If there is a '-' sign in front of the number, the net change is negative.

Filtering Stocks

Once logged into your account, you can use the filter settings to implement your ideal stock metrics.

The filters are located in the pane on the left side of the screen, under Filters.

Enter your desired stock metrics. This includes min/max price range, unit market cap (in millions or billions), min/max market cap range, and min/max volume.

A screenshot of the 'Stock Screener' application's 'Filters' pane. The pane is titled 'Filters' and contains three sections: 'Price', 'Market Cap', and 'Volume (Million)'. Each section has 'Min' and 'Max' input fields. The 'Price' section has Min: 0 and Max: 20. The 'Market Cap' section has a dropdown menu set to 'Billions', Min: 0, and Max: 500. The 'Volume (Million)' section has Min: 0 and Max: 10000. Below the input fields are three yellow buttons: 'Apply', 'Save As Favorite', and 'Load Favorite'.

Click the 'Apply' icon.

Your results will appear in the central pane of the stock screener application under Screened Stocks and the direct number of stocks that match the filtered settings.

Saving Filtered Settings

The stock screener application allows a user to save previously entered filter settings. By default, the application will auto save the last applied filter settings.

To save a desired set of filter settings, click the 'Save As Favorite' icon.

The user is presented with a File Save dialog, and can select the File Name and Path to save it to.

To load a favorite filter, press the 'Load Favorite' icon. A Load File dialog will appear.

Select the file you wish to load through the 'Load Favorite' icon, and then allow the settings to update the filter metrics. Click 'Apply' to apply the filter.

Viewing Your Results

After applying the desired filtered stock metrics, the user can view the results listed under the Screened Stocks chart. The screened stocks will show a list of all the stocks and their information that relate to the applied filter. You can click on a stock data heading in the Screened Stocks pane to sort the stocks by that particular data field.

For more information on the screened stocks variables, refer to the Terminology section of this guide.

Choosing the right stocks will be based on the user's investment strategy. However, it is important to not solely rely on a stock screener for selecting stocks. Additional research should be considered when making investment decisions.

For more information on understanding stocks, stock screeners, and investing, visit <https://www.investopedia.com/articles/01/112101.asp>

Watching Stocks

The user can also elect to watch stocks of their choosing. To watch a stock, click on the green double arrow located in the Watch column of the Screened Stocks pane.

The screenshot shows the 'Stock Screener' application window. On the left is a 'Filters' panel with input fields for Price (Min: 0, Max: 20), Market Cap (Billions, Min: 0, Max: 500), and Volume (Million, Min: 0, Max: 10000). Below these are buttons for 'Apply', 'Save As Favorite', and 'Load Favorite'. The main area is divided into two panes. The 'Screened Stocks' pane (3181 results) displays a table with columns: Ticker, Company, Market Cap (Millions), Price (\$), Volume (Millions), Change (%), and Watch. The 'Watched Stocks' pane on the right shows a table with columns: Stock, Price, Change (%), and Remove. The 'Remove' column contains red 'X' icons for the stocks listed.

Ticker	Company	Market Cap (Millions)	Price (\$)	Volume (Millions)	Change (%)	Watch
AAC	AAC Holdings Inc.	226.07	9.42	0.03	-1.361	↔
AAME	Atlantic American Corporation	71.03	3.48	0.00	-3.472	↔
AAU	Almaden Minerals Ltd.	86.87	0.85	0.03	-1.995	↔
AAV	Advantage Oil & Gas Ltd	536.13	2.88	0.13	-2.271	↔
ABAC	Renmin Tianli Group Inc.	19.72	2.47	0.00	-0.403	↔
ABCD	Cambium Learning Group Inc.	363.56	7.79	0.03	2.365	↔
ABDC	Alcentra Capital Corp.	102.85	7.22	0.03	-1.366	↔
ABE	Aberdeen Emerging Markets Cor	143.88	15.17	0.00	0.404	↔
ABEO	Abeona Therapeutics Inc.	652.51	13.95	0.15	0	↔
ABEV	Ambev S.A. American Depositary	106,441.50	6.78	7.43	-0.074	↔
ABIL	Ability Inc.	10.04	0.39	0.06	-4.341	↔
ABIO	ARCA biopharma Inc.	10.11	0.86	9.78	35.433	↔
ABR	Arbor Realty Trust	530.51	8.60	0.13	0.292	↔
ABUS	Arbutus Biopharma Corporation	288.59	5.20	0.01	-1.048	↔
ABX	Barrick Gold Corporation	13,637.29	11.69	3.73	-0.595	↔
ACBI	Atlantic Capital Bancshares Inc.	445.10	17.30	0.01	0	↔
ACCO	Acco Brands Corporation	1,379.84	12.95	0.06	-1.145	↔
ACER	Acer Therapeutics Inc.	135.33	18.05	0.03	0.278	↔
ACCT	Aceto Corporation	237.34	7.30	0.03	-0.005	↔

Stock	Price	Change (%)	Remove
AAME	3.475	-3.472	X
ABAC	2.47	-0.403	X

When referring to watched stocks, the user can look under the Watched Stocks pane located to the right side of the screen.

If you wish to remove a watched stock, simply click the red 'X' under the Remove column in Watched Stocks.

Watched Stocks			
Stock	Price	Change (%)	Remove
AAME	3.475	-3.472	X
ABAC	2.47	-0.403	X
ABEV	6.775	-0.074	X
ABIO	0.86	35.433	X
ABUS	5.195	-1.048	X

FAQs

Where are we getting our stock information? Our stocks are queried from IEXTrading, which offers real-time and historical stock API.

Who can use a stock screener? Virtually anyone. Our stock screener is meant for all experience-levels who are looking to enhance their investment strategies.

Why use a stock screener? Using a stock screener can benefit a user's investment strategy. It is a great tool that can help a user find stocks within their financial metrics. For more information, see the 'What Is A Stock Screener?' section in our guide.

What stocks and exchanges does the stock screener cover? Our stock screener provides data for over 6,000 stocks, giving the user a large database of stocks and exchanges to filter through.

Does the product cost money? Our stock screener is fully open-source. To install the stock screener, see the instructions under the 'Installation' section of this guide.

Please forward any further questions to kathleenconnell11@gmail.com.

