Stock Screener User Guide

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Version 1

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Revision History

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| **Name** | **Date** | **Reason For Changes** | **Version** |
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**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 application file to download to your computer. **(Add link to final product)**
3. Open the file folder.
4. Run the application. Your computer may alert you to running an unrecognized application. Select 'Run anyway'.
5. Follow along with the prompts to complete the installation process.
6. Click 'Done' to finish.

**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 'Login'.

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.

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. Stock: It is the ticker for a given stock name. The ticker is an arrangement of characters representing a particular security listed on an exchange or otherwise traded publicly.
2. Last Price: Displays the last recent price of the stock.
3. Market Cap: The market value of a company's outstanding shares.
4. Volume: The number of shares or contracts traded in a security or an entire market. during a given period of time.
5. Change %: The net change percentage for a given stock. Red represents a negative net change, where green represents a positive net change.

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.

Click the 'Apply' icon.

Your results will appear in the central pane of the stock screener application.

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.

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, check the box located in the Watch column of the Screened Stocks pane.

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

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

**FAQs**

Where are we getting our stock information?

Who can use a stock screener?

Why use a stock screener?

What stocks and exchanges does the stock screener cover?

Does the product cost money?

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