

Investia Sector Screener – User Guide

1. About this app

The Investia Sector Screener enables you to explore financial metrics for companies across different sectors and industries. It allows filtering, comparison, and export of structured data directly from Yahoo Finance, with a focus on simplicity, accessibility, and powerful screening logic.

2. Getting Started: Selecting a Sector and Industry

- a. On launching the app, you're presented with a sector selector — a horizontal set of buttons listing sectors such as Technology, Energy, Healthcare, etc.
- b. Choose one sector to begin.
- c. Once selected, a second dropdown appears with all industries within that sector, such as "Semiconductors" under Technology. You can:
 - i. Select one or more industries
 - ii. Or choose "All" to include the full sector
 - iii.

3. Choosing the Data View

- a. After selecting industries, choose a data method:
 - i. Top Companies: Returns the largest firms in the selected industries, based on market capitalisation.
 - b. Top Growth: Focuses on companies with strong growth indicators such as revenue, earnings, or cash flow growth.
 - c. Top Performers: Highlights companies with the best recent stock price performance.
- Each data set comes directly from Yahoo Finance's industry data endpoints.

4. Filtering the Results:

- a. Under the "Apply Filters" section (collapsible):
 - i. Market Cap Range: Use the slider to narrow down companies by size, shown in million USD. E.g. set a minimum of 5000 to see only companies with \$5B+ market cap.
 - ii. Top 20: Tick this box to show only the top 20 companies by market cap.
 - iii. Ratings Filter (if available): Allows you to filter based on qualitative or proprietary ratings present in the dataset.
- b. You can combine these filters freely.

5. Viewing and Downloading the Data

- a. Once filters are applied, a clean table of companies appears:
 - i. Each column shows a financial metric
 - ii. Gradient colouring (green/red) helps highlight performance:
 - iii. Green = more attractive (e.g. higher margin)
 - iv. Red = less attractive (e.g. expensive valuation)
- b. You'll find two download buttons:
 - i. Formatted Excel: Includes colour styling as seen in the app
 - ii. Plain Excel: Raw data, no styling – ideal for additional analysis

6. Uploading a Custom Ticker List

- a. You can skip sector/industry selection by choosing "None". This enables custom upload mode:
 - i. Upload an .xlsx file with one ticker per row
 - ii. The app will fetch names and financials for those tickers

- iii. You can apply the same filters and download options
- b. You may also add custom tickers on top of an existing industry selection (e.g. to supplement with missing companies).

7. Understanding the Columns

Column	Meaning
Name	Official company name (from Yahoo Finance)
Ticker	Stock symbol
Revenue (M USD)	Latest reported revenue, in millions of USD
Market Cap (M USD)	Market capitalisation, in millions of USD
Gross Margin (%)	Gross profit as % of revenue
EBIT Margin (%)	Operating earnings as % of revenue
EBITDA Margin (%)	EBITDA as % of revenue
P/E	Price-to-Earnings ratio
EV/EBITDA	Enterprise Value divided by EBITDA
EV/Sales	Enterprise Value divided by Revenue
P/FCF	Price to Free Cash Flow ratio
Market Weight (%)	Share of the company's market cap relative to others in the industry
Industry	Assigned industry within the sector
Rating	(Optional) Analyst or internal rating if provided

8. Other Notes

- a. All currency values are automatically converted to USD
- b. Missing values may occur when data is not available from Yahoo Finance
- c. Uploaded tickers are validated — the app will inform you if any are invalid or duplicated

9. Support & Contact

- a. This is a bèta release of the Investia Sector Screener.
- b. For questions, feedback, or suggestions, contact: Vince Coppens (vince.coppens@investialeuven.be)