



## INSIDERIQ PRO'S GUIDE TO GETTING THE MOST OUT OF INSIDER TRANSACTION DATA

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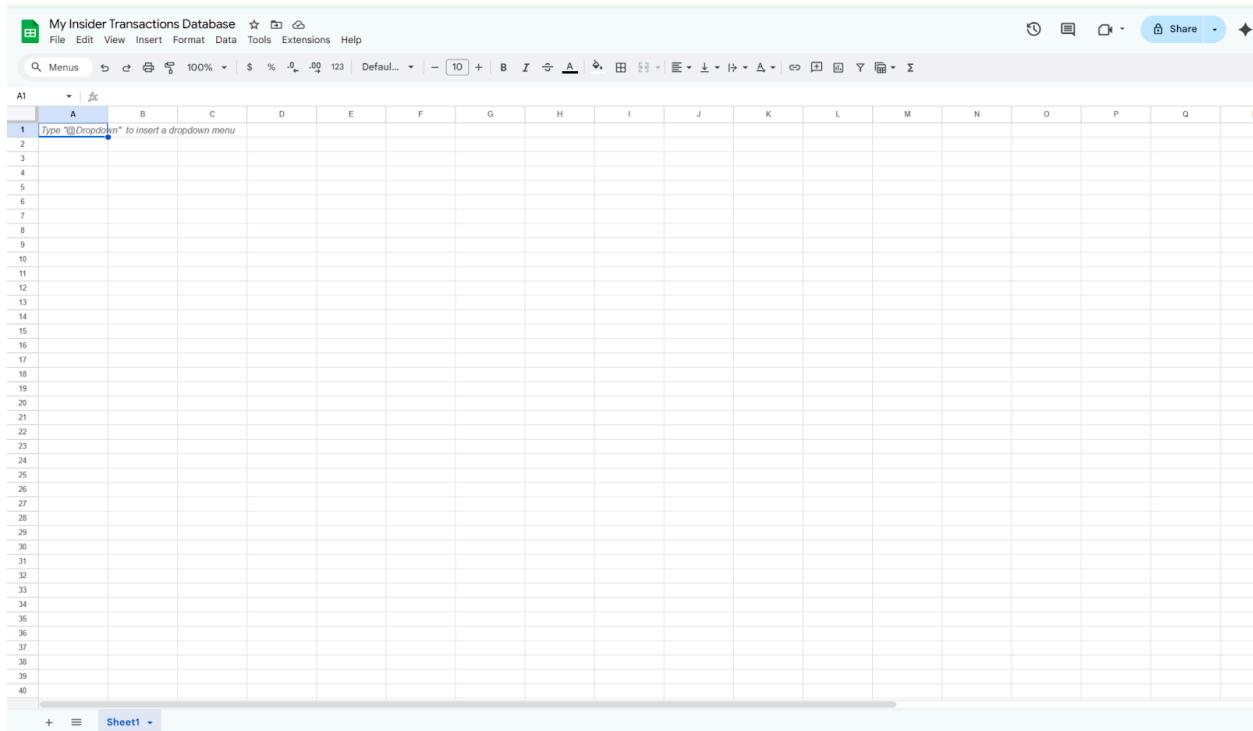
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The most successful traders and investors think like analysts: they study patterns, measure behavior over time, and make decisions based on evidence rather than emotion. The real edge comes from turning raw market information into actionable signals. Insider filings don't predict the market, but when analyzed properly, they can reveal valuable signs about conviction, incentives, and timing that price action alone often hides. Insider transactions alone don't make trades. **Insight does.**

We at InsiderIQ Pro can only provide the raw material. Your analysis, judgment, and risk management turn it into an opportunity.



## GATHER & CLEAN UP YOUR DATA



Open up a Google Sheet Workbook, you should be presented with a blank sheet. This is your new Insider Trades database. As you receive more insider data keep them within this database to stay organized.



Visit: [www.insideriqpro.com](http://www.insideriqpro.com)



My Insider Transactions Database

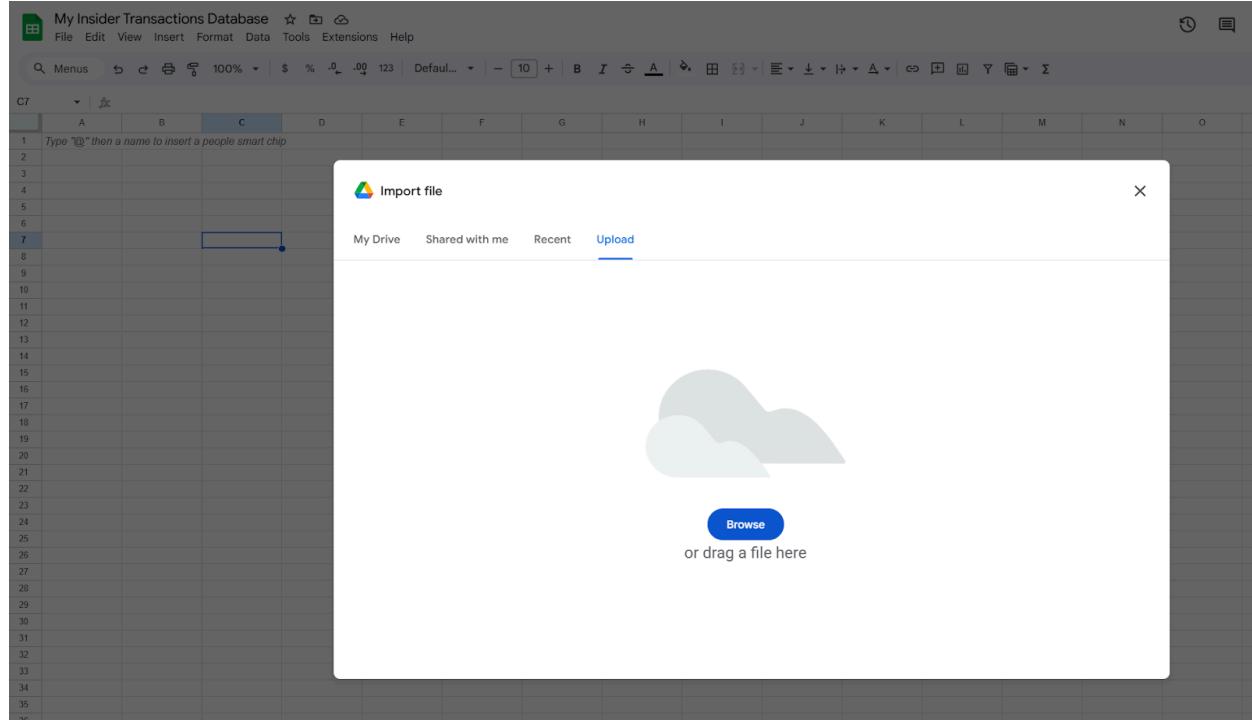
File Edit View Insert Format Data Tools Extensions Help

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To remain on the same sheet you are already on, when you see the drop down menu that says “Create New Spreadsheet”, click on it and select “Replace current spreadsheet”. Then continue.



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After import, highlight all rows by clicking the white square at the very top right corner of your spreadsheet.



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Sort sheet Sort range

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2 Form 4 https://www.sec.gov 20; + Create filter view

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6 Form 4 https://www.sec.gov 20; ⌂ Randomize range

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9 Form 4 https://www.sec.gov 20; ⌂ Data cleanup

10 Form 4 https://www.sec.gov 20; ⌂ Split text to columns

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Is Director Is Officer Is Ten Percent Officer Title Financial Product Transaction Date Num Shares Tra Price Per Share Transaction Type Post Transaction Ownership Type Relevant C

TRUE FALSE FALSE Class A Common 2025-12-09 19900 0 D 169110 I 2025-

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TRUE FALSE FALSE Class C Capital 2025-12-09 19900 0 D 169110 I 2025-

TRUE FALSE FALSE Class C Capital 2025-12-09 19900 0 A 368570 I 2025-

Jenni 0 1 0 Chief Legal Offic Class A Common 2025-12-09 519 66416 D 30215 D 2025-

ial 1 0 0 Common Stock 2025-12-09 56820 45066 D 1391615 D 2025-

ial 1 0 0 Common Stock 2025-12-09 15242 0 D 1376373 D 2025-

gene 1 0 0 Deferred Share I 2025-12-09 185533 20212 A 50580682 D 2025-

MARI 1 0 0 Deferred Share I 2025-12-09 247378 20212 A 141531187 D 2025-

al E 1 0 0 Deferred Share I 2025-12-09 154611 20212 A 331233 D 2025-

edoffrey S 1 0 0 Chief Risk Offic Common Stock 2025-12-09 8800 0 D 1373904 I 2025-

Chief Risk Offic Common Stock 2025-12-09 465 0 D 1373439 I 2025-

0 CFO Common Stock 2025-12-09 1200 0 D 60109615 D 2025-

Common Stock 2025-12-10 4386 0 D 68980 D 2025-

Trim whitespace FALSE SEVP - Group P Common Stock 2025-12-09 228 15368 D 254650 D 2025-

FALSE SEVP - Group P Common Stock 2025-12-09 175 15368 D 254475 D 2025-

FALSE Executive Chair Common Stock 2025-12-09 380 15368 D 213271 D 2025-

Executive Chair Common Stock 2025-12-09 291 15368 D 212980 D 2025-

TZ Cr TRUE TRUE FALSE CEO & President Common Stock 2025-12-09 829 15368 D 509951 D 2025-

TZ Cr TRUE TRUE FALSE CEO & President Common Stock 2025-12-09 635 15368 D 509316 D 2025-

Herman Ernie TRUE TRUE FALSE CEO & President Common Stock 2025-12-09 220 15368 D 120840 D 2025-

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Canestri Kent FALSE TRUE FALSE SEVP - Group P Common Stock 2025-12-09 245 15368 D 150610 D 2025-

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Benjamin Peter FALSE TRUE FALSE SEVP - Group P Common Stock 2025-12-09 114 15368 D 53055 D 2025-

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MURPHY ANDR 0 1 0 EVP Research Common Stock 2025-12-09 2552 70151 D 21673 D 2025-

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Van Plev Daniel 0 1 0 EVP & Generall Common Stock 2025-12-09 131874 70151 D 310460 D 2025-

YANCOPPOULOS 1 1 0 Bd Co-Chair, Pr Common Stock 2025-12-09 0 D 0 D 2025-

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Under the Data tab, hover your mouse over “Data cleanup”, and you should get the option to “Remove duplicates”.





My Insider Transactions Database

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1:1768 Form Type

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Form Type	URL	Filing Date	Company Name	Ticker Symbol	Insider Name	Is Director	Is Officer	Is Ten Percent C Officer Title	Financial Product	Transaction Date	Number	
2	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
3	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
4	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
5	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
6	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
7	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
8	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
9	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Alphabet Inc.	GOOGL	Shriram Kavitark	TRUE	FALSE	FALSE	Class A Comm	2025-12-09		
10	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Meta Platforms	META	Newstead Jennif	0	0	0	Capital	2025-12-09		
11	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Tesla, Inc.	TSLA	Musk Kimbal	1	1	1	Capital	2025-12-09		
12	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	Tesla, Inc.	TSLA	Musk Kimbal	1	1	1	Capital	2025-12-09		
13	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	JOHNSON & JOHNSON	JNJ	Woods Eugene	1	1	1	Capital	2025-12-09		
14	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	JOHNSON & JOHNSON	JNJ	HEWSON MARI	1	1	1	Capital	2025-12-09		
15	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	JOHNSON & JOHNSON	JNJ	Pinto Daniel E	1	1	1	Capital	2025-12-09		
16	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	BANK OF AMERICA	BAC	Greener Geoffrey S	1	1	1	Capital	2025-12-09		
17	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	BANK OF AMERICA	BAC	Greener Geoffrey S	1	1	1	Capital	2025-12-09		
18	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T-Mobile US, Inc	TMUS	Osvaldik Peter	0	0	0	Stock	2025-12-09		
19	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	HERMOFISHE	TMO	SPERLING SCC	1	1	1	Stock	2025-12-10		
20	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Mizzi Douglas W	FALSE	0	0	Stock	2025-12-09		
21	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Mizzi Douglas W	FALSE	0	0	Stock	2025-12-09		
22	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	MEYROWITZ CI	TRUE	1	1	Stock	2025-12-09		
23	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	MEYROWITZ CI	TRUE	1	1	Stock	2025-12-09		
24	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Herman Ernie	TRUE	1	1	Stock	2025-12-09		
25	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Herman Ernie	TRUE	1	1	Stock	2025-12-09		
26	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Canestrari Kenn	FALSE	0	0	Stock	2025-12-09		
27	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Canestrari Kenn	FALSE	0	0	Stock	2025-12-09		
28	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Benjamin Peter	FALSE	0	0	Stock	2025-12-09		
29	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Benjamin Peter	FALSE	0	0	Stock	2025-12-09		
30	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Klinger John	FALSE	0	0	Stock	2025-12-09		
31	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	T.J.X. COMPANIES	TJX	Klinger John	FALSE	0	0	Stock	2025-12-09		
32	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	REGENERON	FREGN	MURPHY ANDR	0	1	0	EV Research	Common Stock	2025-12-09	
33	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	REGENERON	FREGN	McCourt Marion	0	1	0	EV Research	Common Stock	2025-12-09	
34	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	REGENERON	FREGN	Van Plew Daniel	0	1	0	EV & General	I Common Stock	2025-12-09	
35	Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	REGENERON	FREGN	YANCOPOULOS	1	1	0	Bd Co-Chair, Pr	Common Stock	2025-12-09	

Remove duplicates

1768 rows and 26 columns selected

Data has header row

Columns to analyze

Select all

Column A - Form Type

Column B - URL

Column C - Filing Date

Column D - Company Name

Column E - Ticker Symbol

Column F - Insider Name

Column G - Is Director

Column H - Is Officer

Cancel Remove duplicates

Check the box that says “Data has header row” then click “Remove duplicates”. Once that is done, your data is now clean and ready to give you quality information to trade/invest on.



## UNDERSTANDING YOUR DATA

My Insider Transactions Database

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Form Type URL Filing Date Company Name Ticker Symbol Insider Name Is Director Is Officer Is Ten Percent Officer Title Financial Product Transaction Date Num Shares Trs Price Per Share Total Transaction Transaction Type Post Transaction Ownership

A1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Form Type	URL	Filing Date	Company Name	Ticker Symbol	Insider Name	Is Director	Is Officer	Is Ten Percent Officer Title	Financial Product	Transaction Date	Num Shares	Trs Price	Per Share	Total Transaction	Transaction Type	Post Transaction	Ownership
2	Form 4	https://www.sec.gov/	2025-12-17	NVIDIA CORP.	NVDA	JONES HARVEY	1	0	0	Common Stock	2025-12-15	250000	177.3338	44333450	D	6933290	I	
3	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Schindler Philip	FALSE	TRUE	FALSE	SVP, Chief Busin Class C Google	2025-12-15	12	0	0	0	18155	D	
4	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Schindler Philip	FALSE	TRUE	FALSE	SVP, Chief Busin Class C Google	2025-12-15	41	0	0	0	60817	D	
5	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Schindler Philip	FALSE	TRUE	FALSE	SVP, Chief Busin Class C Google	2025-12-15	68	0	0	0	100680	D	
6	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	WALKER JOHN	FALSE	TRUE	FALSE	President, Glob Class C Google	2025-12-15	10	0	0	0	14207	D	
7	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	WALKER JOHN	FALSE	TRUE	FALSE	President, Glob Class C Google	2025-12-15	32	0	0	0	47596	D	
8	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	WALKER JOHN	FALSE	TRUE	FALSE	President, Glob Class C Google	2025-12-15	55	0	0	0	80455	D	
9	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Ashkenazy Anat	FALSE	TRUE	FALSE	SVP, Chief Finan Class C Google	2025-12-15	16	0	0	0	23411	D	
10	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Ashkenazy Anat	FALSE	TRUE	FALSE	SVP, Chief Finan Class C Google	2025-12-15	22	0	0	0	31334	D	
11	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Ashkenazy Anat	FALSE	TRUE	FALSE	SVP, Chief Finan Class C Google	2025-12-15	55	0	0	0	81803	D	
12	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	CHAVEZ R. MAI	TRUE	FALSE	FALSE	Class C Google	2025-12-15	1	0	0	0	1482	D	
13	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	CHAVEZ R. MAI	TRUE	FALSE	FALSE	Class C Google	2025-12-15	0.8	0	0	0	1133	D	
14	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	CHAVEZ R. MAI	TRUE	FALSE	FALSE	Class C Google	2025-12-15	0.9	0	0	0	1270	D	
15	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	CHAVEZ R. MAI	TRUE	FALSE	FALSE	Class C Google	2025-12-15	1	0	0	0	1809	D	
16	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	11379	206.11	3362193.69	D	2260740	D	
17	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	533	290.19	1555416.27	D	2255207	D	
18	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	8127	300.35	2440944.45	D	2247080	D	
19	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	4461	301.19	1345809.58	D	2242619	D	
20	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	1860	302.17	543906	D	2240819	D	
21	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	300	303.92	91176	D	2240519	D	
22	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	100	304.74	30474	D	2240419	D	
23	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	300	306.39	91917	D	2240119	D	
24	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	500	307.47	153735	D	2239619	D	
25	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Pichai Sundar	TRUE	TRUE	FALSE	Chief Executive Class C Capital	2025-12-15	51	0	0	0	74925	D	
26	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	33	306.68	10120.44	D	4483	I	
27	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	78	307.9	24016.2	D	4405	I	
28	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	89	309.02	27502.78	D	4316	I	
29	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	50	307.08	15354	D	4266	I	
30	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	90	308.26	27743.4	D	4176	I	
31	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	60	309.07	18544.2	D	4116	I	
32	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	30	306.58	91974	D	4086	I	
33	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	50	307.59	15379.5	D	4036	I	
34	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	92	308.65	28395.6	D	3944	I	
35	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Capital	2025-12-15	28	309.32	8666.96	D	3916	I	
36	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Google	2025-12-15	0.5	0	0	0	665	D	
37	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Google	2025-12-15	1	0	0	0	1619	D	
38	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Google	2025-12-15	1	0	0	0	1813	D	
39	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	Hennessy John	TRUE	FALSE	FALSE	Class C Google	2025-12-15	2	0	0	0	2584	D	
40	Form 4	https://www.sec.gov/	2025-12-17	Alphabet Inc.	GOOGL	O'Toole Anna Th	FALSE	TRUE	FALSE	VP, Chief Accou Class C Capital	2025-12-15	2778	312.3	867599.4	D	8962	D	

If done correctly, you should now see all the transactions filed for that particular trading day present in your google sheet. I advise that you name your sheet by the filing date to keep yourself organized. Being organized is very important as a data analyst. You can do that by right-clicking on the "Sheet1" tab at the very bottom on the left side of your sheet and selecting "Rename".



Next, familiarize yourself with all the columns and the information they contain:

**Form Type:** This shows if the transaction is a Form 4 (Filed when an insider executes a transaction) or a Form 3 transaction (Filed when a person first becomes an insider (for example, when they are hired as an officer or director), to initially disclose his or her ownership of the company's securities.).

**URL:** This is the link to the actual SEC filing. There is both an XML version and a HTML version, which is more human-readable on the SEC website. The URLs on the spreadsheet lead you to the XML version. In order to see the HTML version which is more human-readable, add "/xslF345X05" right before the last tab on the URL.

**Ex:**

**XML Version URL:**

[https://www.sec.gov/Archives/edgar/data/1045810/000119765025000009/wk-form4\\_1766008616.xml](https://www.sec.gov/Archives/edgar/data/1045810/000119765025000009/wk-form4_1766008616.xml)

**HTML Version URL:**

[https://www.sec.gov/Archives/edgar/data/1045810/000119765025000009/xslF345X05/wk-form4\\_1766008616.xml](https://www.sec.gov/Archives/edgar/data/1045810/000119765025000009/xslF345X05/wk-form4_1766008616.xml)

**Filing Date:** This shows the date the transaction was filed with the SEC.

**Company Name:** This is the name of the company whose shares are involved in the transaction..Ex, Alphabet Inc.

**Ticker Symbol:** This is the ticker symbol of the company whose shares are involved in the transaction. Ex..GOOGL (Company Name: Alphabet Inc.)

**Insider Name:** This is the name of the company's insider carrying out the stock trade.

**Insider Position (Is Director, Is Officer, Is Ten Percent Owner):** This is the position the particular insider holds within the company. There are 3 main categories. Directors,



which are any members on the company's board of directors, Officers such as the CEO or CFO and Ten percent owner, which is any individual who owns up to 10% of the company's stock.

**Officer Title:** This shows the title the Insider holds within the company. Ex..Chief Executive Officer

**Financial Product:** This shows the type of financial product that was involved in the transaction. There are various products like Common stock, Options, Warrants. I'd recommend you learn more about each and what they are. Keep in mind that financial products can have multiple labels for the same product. For example, stocks traded on exchanges can be called Common stock, Ordinary shares, Class A shares or even be labeled as Stock Units, but they all represent the same thing.

**Transaction Date:** This shows the date the stock trade was carried out.

**Num Shares Traded:** This shows the number of shares traded in each transaction.

**Price Per Share:** This shows the price at which each share was bought for in the transaction carried out. Note, If you look through the data you can see some transactions have a purchase price of \$0, those are usually options or other financial products that are usually incentives given to insiders.

**Total Transaction Value:** This is the total value of each transaction carried out. Basically, the number of shares traded multiplied by the price of each share.

**Transaction Type:** There are 2 transaction types, A for Acquired which can also represent a Buy, and D for Disposed which can also represent a Sale.

**Transaction Code:** The transaction codes show what type of transaction was carried out by the insider. For most day traders and swing traders, the most important transaction codes when trading with insider data are, P (Open market purchase) and S (Open market sale), those are trades carried out in the open market like most other trades. There are also codes like M (Option exercise) and A (Stocks given as an award/grant) which can still signal a good opportunity. Depending on the strategy you use, the transaction codes you look for can be different.



You can view all the official transaction codes and their full description here on the SEC website, <https://www.sec.gov/edgar/searchedgar/ownershipformcodes.html>.

**Post Transaction Value:** This represents how many shares of the company the insider has in their possession after the transaction was carried out.

**Ownership Type:** There are 2 ownership types D for Direct and I for Indirect. Indirect ownership is usually seen when the transaction is carried out by an Insider for someone else, like their spouse, children or through a Trust.

**Relevant Date:** Same as the Transaction Date.





## ANALYZE CLEANED DATA

### Using Filters

Filters are a great way to narrow down and understand your data better. They help you cut out the noise so you can focus on the transactions you really want to see.

The screenshot shows a spreadsheet application window titled "My Insider Transactions Database". The "Data" tab is selected in the top menu. A dropdown menu is open under "Data", showing the following options:

- Sort sheet
- Sort range
- Create a filter
- Create group by view
- Create filter view
- Add a slicer
- Protect sheets and ranges
- Named ranges
- Named functions
- Randomize range
- Column stats
- Data validation
- Data cleanup
- Split text to columns
- Data extraction
- Data connectors

The "Create a filter" option is highlighted. The main spreadsheet area shows a table with columns A through I. The table has 29 rows, with rows 1 through 24 being Form 4 transactions and rows 25 through 29 being Form 4 transactions for TJX COMPANIE. The columns include Form Type, URL, Filing Date, Name, Is Director, Is Officer, Is Ten Percent Owner, and Office Type.

With the full spreadsheet selected, select the Data tab, then select “Create a filter” from the dropdown menu.

Visit: [www.insideriqpro.com](http://www.insideriqpro.com)



My Insider Transactions Database

File Edit View Insert Format Data Tools Extensions Help

1:1 Form Type

	A	B	C	D	E	F	G	H	I	J
	Company Name	Ticker Symbol	Insider Name	Is Director	Is Officer	Is Ten Percent	Officer Title			
⌘ Cut	Alphabet Inc.	GOOGL	Shriram Kavitaran	TRUE	FALSE	FALSE				
⌘ Copy	Alphabet Inc.	GOOGL	Shriram Kavitaran	TRUE	FALSE	FALSE				
⌘ Paste	Alphabet Inc.	GOOGL	Shriram Kavitaran	TRUE	FALSE	FALSE				
Paste special	Alphabet Inc.	GOOGL	Shriram Kavitaran	TRUE	FALSE	FALSE				
Alphabet Inc.	GOOGL	Shriram Kavitaran	TRUE	FALSE	FALSE					
Meta Platforms, Inc.	META	Newstead Jennifer	0	1	0	Chief Legal Officer				
Tesla, Inc.	TSLA	Musk Kimbal	1	0	0					
Tesla, Inc.	TSLA	Musk Kimbal	1	0	0					
JOHNSON & JOHNSON	JNJ	Woods Eugene	1	0	0					
JOHNSON & JOHNSON	JNJ	HEWSON MARI	1	0	0					
JOHNSON & JOHNSON	JNJ	Pinto Daniel E	1	0	0					
BANK OF AMERICA	BAC	Greener Geoffrey S		1		Chief Risk Officer				
BANK OF AMERICA	BAC	Greener Geoffrey S		1		Chief Risk Officer				
T-Mobile US, Inc.	TMUS	Osvaldik Peter	0	1	0	CFO				
THERMO FISHER SCIENTIFIC	TMO	SPERLING SCOTT	1							
TJX COMPANIES, INC.	TJX	Mizzi Douglas W	FALSE	TRUE	FALSE	SEVP - Group President				
TJX COMPANIES, INC.	TJX	Mizzi Douglas W	FALSE	TRUE	FALSE	SEVP - Group President				
TJX COMPANIES, INC.	TJX	MEYROWITZ C	TRUE	TRUE	FALSE	Executive Chairman				
TJX COMPANIES, INC.	TJX	MEYROWITZ C	TRUE	TRUE	FALSE	Executive Chairman				
TJX COMPANIES, INC.	TJX	Herrman Ernie	TRUE	TRUE	FALSE	CEO & President				
TJX COMPANIES, INC.	TJX	Herrman Ernie	TRUE	TRUE	FALSE	CEO & President				
TJX COMPANIES, INC.	TJX	Canestrari Kenn	FALSE	TRUE	FALSE	SEVP - Group President				
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1	Freeze up to row 1	ari Kenn	FALSE	TRUE	SEVP - Group President			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1		n Peter	FALSE	TRUE	SEVP, Group President			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1	Group row	John	FALSE	TRUE	SEVP, CFO			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1		John	FALSE	TRUE	SEVP, CFO			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1	Get link to this range	Y ANDREW	0	1	0 EVP Research			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1		t Marion	0	1	0 EVP Commercial			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1	Define named range	w Daniel	0	1	0 EVP & General M			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1	Protect range	POULOS	1	1	0 Bd. Co-Chair, Pr			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-1		POULOS	1	1	0 Bd. Co-Chair, Pr			
Form 4	<a href="https://www.sec.gov/">https://www.sec.gov/</a>	2025-12-11	REGENERON PHARMACEUTICALS INC	YANCOPOULOS	1	1	0 Bd. Co-Chair, Pr			

I'd also advise that you freeze the top row containing the headers. You can do this by right-clicking on Row 1, hovering over the last option to "View more row actions" then select "Freeze up to row 1". This makes sure the headers are always visible and makes it easier for you to know what column you're looking at even when you scroll all the way down.

Now with the filters set you are able to dive into your data a bit more by using the drop down menu the filters provide for each column. Ex..Under Price Per Share you can



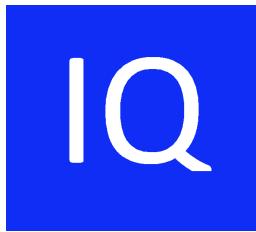
deselect all Blank rows and rows with \$0 transaction prices to help filter out some incentive transactions from your analysis.

Extra Tip: Use CTRL+F, to search through your table. A search bar should come up at the top right of your spreadsheet and whatever you input will be highlighted on the spreadsheet. Use the arrows to move through all highlighted sections.

### Using Pivot Tables

Pivot Tables are great for summarizing your data so you can get the full gist of what it's trying to tell you. With a Pivot table, you can find out the most bought or most sold stock of a particular trading day, whether based on the number of shares traded or the total value of the transaction. You can also find out which stock was traded by the most insiders or see how much money insiders put in or took out of the stock market as a whole on a particular trading day. This really helps you know whether there is significant volume coming into the market or into a stock you might be interested in, which helps you get on the wave and not miss the trend.





My Insider Transactions Database			
<span>File</span> <span>Edit</span> <span>View</span> <span>Insert</span> <span>Format</span> <span>Data</span> <span>Tools</span> <span>Extensions</span> <span>Help</span>			
<span>Menus</span> <span>Form T</span>			
A1	A		
1	Form Type	URL	
2	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
3	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
4	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
5	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
6	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
7	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
8	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
9	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
10	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
11	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
12	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
13	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
14	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
15	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
16	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
17	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
18	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
19	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
20	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
21	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
22	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
23	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
24	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
25	Form 4	<a href="https://www.sec.gov">https://www.sec.gov</a>	
26	Form 4	2025-12-11 T.J.X. COMPANIE T.J.X.	
27	Form 4	2025-12-11 T.J.X. COMPANIE T.J.X.	
28	Form 4	2025-12-11 T.J.X. COMPANIE T.J.X.	

Under the Insert tab, select the “Pivot table” option.



My Insider Transactions Database

File Edit View Insert Format Data Tools Extensions Help

Form Type

1 Form Type URL Filing Date Company Name Ticker Symbol Insider Name Is Director Is Officer Is Ten Percent Officer Title Financial Product Transaction Num Shares Price Per

2 Form 4 https://www.sec.gov 2025-12-11 Alphabet Inc. GOOGL Shriram Kavitarak TRUE FALSE FALSE Class A Comm 2025-12-09 19600

3 Form 4 https://www.sec.gov 2025-12-11 Alphabet Inc. GOOGL Shriram Kavitarak TRUE FALSE FALSE Class A Comm 2025-12-09 19600

4 Form 4 https://www.sec.gov 2025-12-11 Alphabet Inc. GOOGL Shriram Kavitarak TRUE FALSE FALSE Class A Comm 2025-12-09 19600

5 Form 4 https://www.sec.gov 2025-12-11 Alphabet Inc. GOOGL Shriram Kavitarak TRUE FALSE FALSE Class C Capital 2025-12-09 19600

6 Form 4 https://www.sec.gov 2025-12-11 Alphabet Inc. GOOGL Shriram Kavitarak TRUE FALSE FALSE Class C Capital 2025-12-09 19600

7 Form 4 https://www.sec.gov 2025-12-11 Alphabet Inc. GOOGL Shriram Kavitarak TRUE FALSE FALSE Class C Capital 2025-12-09 19600

8 Form 4 https://www.sec.gov 2025-12-11 Meta Platforms, Inc. META Newstead Jennifer 0 1 0 Chief Legal Officer Class A Comm 2025-12-09 519 €

9 Form 4 https://www.sec.gov 2025-12-11 Tesla, Inc. TSLA Musk Kimbal 1 0 0 Common Stock 2025-12-09 56820 €

10 Form 4 https://www.sec.gov 2025-12-11 Tesla, Inc. TSLA Musk Kimbal 1 Stock 2025-12-09 15242

11 Form 4 https://www.sec.gov 2025-12-11 JOHNSON & JOHNSON INC. JNJ Woods Eugene 1 Stock 2025-12-09 185.533

12 Form 4 https://www.sec.gov 2025-12-11 JOHNSON & JOHNSON INC. JNJ HEWSON MARI 1 Stock 2025-12-09 247.378

13 Form 4 https://www.sec.gov 2025-12-11 JOHNSON & JOHNSON INC. JNJ Pinto Daniel E 1 Stock 2025-12-09 154.611

14 Form 4 https://www.sec.gov 2025-12-11 BANK OF AMERICA BAC Greener Geoffrey S Stock 2025-12-09 8800

15 Form 4 https://www.sec.gov 2025-12-11 BANK OF AMERICA BAC Greener Geoffrey S Stock 2025-12-09 465

16 Form 4 https://www.sec.gov 2025-12-11 T-Mobile US, Inc. TMUS Osvaldik Peter 0 Stock 2025-12-09 1200

17 Form 4 https://www.sec.gov 2025-12-11 THERMO FISHE TMO SPERLING SCOTT 1 Stock 2025-12-10 4386

18 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Mizzi Douglas W FALSE Stock 2025-12-09 228

19 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Mizzi Douglas W FALSE Stock 2025-12-09 175

20 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. MEYROWITZ C. TRUE Stock 2025-12-09 380

21 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. MEYROWITZ C. TRUE Stock 2025-12-09 291

22 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Herman Ernie TRUE Stock 2025-12-09 829

23 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Herman Ernie TRUE Stock 2025-12-09 635

24 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Canestrari Kenn FALSE Stock 2025-12-09 220

25 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Canestrari Kenn FALSE Stock 2025-12-09 169

26 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Benjamin Peter FALSE TRUE FALSE SEVP, Group Pr Common Stock 2025-12-09 245

27 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Benjamin Peter FALSE TRUE FALSE SEVP, Group Pr Common Stock 2025-12-09 210

28 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Klinger John FALSE TRUE FALSE SEVP, CFO Common Stock 2025-12-09 114

29 Form 4 https://www.sec.gov 2025-12-11 T.J.X. COMPANIES T.J.X. Klinger John FALSE TRUE FALSE SEVP, CFO Common Stock 2025-12-09 169

30 Form 4 https://www.sec.gov 2025-12-11 REGENERON F REGN MURPHY ANDR 0 1 0 EVP Research Common Stock 2025-12-09 4229

31 Form 4 https://www.sec.gov 2025-12-11 REGENERON F REGN McCourt Marion 0 1 0 EVP Commercial Common Stock 2025-12-09 1021

32 Form 4 https://www.sec.gov 2025-12-11 REGENERON F REGN Van Plew Daniel 0 1 0 EVP & General Manager Common Stock 2025-12-09 2552

33 Form 4 https://www.sec.gov 2025-12-11 REGENERON F REGN YANCOPOULOS 1 1 0 Bd. Co-Chair, Pr Common Stock 2025-12-09 146815

34 Form 4 https://www.sec.gov 2025-12-11 REGENERON F REGN YANCOPOULOS 1 1 0 Bd. Co-Chair, Pr Common Stock 2025-12-09 131874

35 Form 4 https://www.sec.gov 2025-12-11 REGENERON F REGN YANCOPOULOS 1 1 0 Bd. Co-Chair, Pr Non-Qualified St 2025-12-09 146815

36 Form 4 https://www.sec.gov 2025-12-11 REGFNRNFR F REGN SCHIFFER I F 1 1 0 Bd. Co-Chair, Pr Common Stock 2025-12-09 172723

Create pivot table

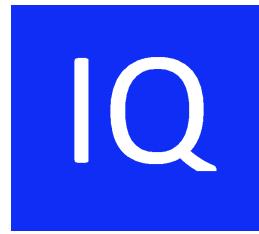
Data range: Sheet1!A1:R1437

Insert to: New sheet Existing sheet

Cancel Create

Leave everything as is and select create. This should take you to a new sheet that looks like the one below.





The screenshot shows a Microsoft Excel spreadsheet titled "My Insider Transactions Database". The Pivot Table editor is open on the right side. The Pivot Table structure is as follows:

- Rows:** Columns
- Values:** (empty)

The Pivot Table editor pane on the right lists various data fields with "Add" buttons to include them in the respective sections:

- Suggested:**
  - Sum of Post Transaction Value for each Company Name
  - Sum of Total Transaction Value, Post Transaction Value for each Company Name
  - Sum of Total Transaction Value for each Company Name
- Rows:** (with an "Add" button)
- Columns:** (with an "Add" button)
- Values:** (with an "Add" button)
- Filters:** (with an "Add" button)

At the top of the editor pane, there is a search bar and a "Clear all" button.

The 2 columns on the right will be how you will be factoring in and factoring out parts of your data.

Notice the 4 sections, **Rows** (Shows all data in this section on rows), **Columns** (Shows all data in this section on columns), **Values** (Shows all data in this section as numerical values. This can help with calculations like getting the sum, count or average) and **Filters** (This acts like the filters discussed earlier and allows you to include or exclude parts of the data). From the list of headers on the very right, you can drag and drop them into either of these 4 sections and see what happens. I recommend you play around with it to get a better feel of how it works.



Example: For the image below, I have dropped the Ticker Symbol header into the Rows section, now all ticker symbols are laid out on their individual rows.

My Insider Transactions Database

Pivot table editor

2025-12-17!A1:S2940

Clear all

Suggested

- Sum of Post Transaction Value for each Company Name
- Sum of Total Transaction Value, Post Transaction Value for each Company Name
- Sum of Total Transaction Value for each Company Name

Rows

Ticker Symbol

Order Ascend... Sort by Ticker Sy...

Show totals

Columns

Values

Filters

Search

Form Type

URL

Filing Date

Company Name

Ticker Symbol

Insider Name

Is Director

Is Officer

Is Ten Percent Owner

Officer Title

Financial Product

Transaction Date

Num Shares Traded

Price Per Share

Total Transaction Value

Transaction Type

Post Transaction Value

Ownership Type

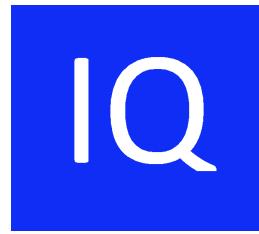
Relevant Date

2025-12-17!A1:S2940

Pivot Table 2



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I can then drag the Ticker symbol header into the Values section and now it shows how many transactions there are for each stock symbol.

My Insider Transactions Database

Ticker Symbol	COUNTA of Tick
(SIRI)	1
AAL	1
AAOI	1
ABNB	5
ACM	24
ACNB	15
ACR	1
ACVA	4
ADPT	7
AUDSK	1
AESI	1
AFRM	7
AGX	20
AHH	3
AI	8
ALL	4
ALLY	1
AMBA	2
AMKR	7
AMPL	3
AMR	14
ANDE	2
AORT	1
ARE	13
ARQT	3
ARX	1
ASIX	2
ASTS	1
AUR	2
AVBC	1
AVGO	2
AXGN	19
AXON	1
BAC	3
BCDA	2
BDX	1
BFLY	5
BH	2
RI	2

Pivot table editor

Rows: Ticker Symbol

Columns: Ticker Symbol

Values: COUNTA

Filters:





Below, this pivot table shows some vital information for the average trader or investor. The criterias set are:

**Rows:**

Ticker Symbol: Order (Descending), Sort by: Sum of Total Transaction Value.  
Show totals (Unchecked).

Transaction type: Default setting, except Show totals (Unchecked).

**Values:**

Total Transaction Value: Summarized by (SUM). Show as (Default).

**Filters:**

Transactions Date: Days selected 11th -17th of December 2025. This basically shows you a week of data (5 trading days).





My Insider Transactions Database

File Edit View Insert Format Data Tools Extensions Help

C1 SUM of Total Transaction Value

	Ticker Symbol	Transaction Type	SUM of Total Transaction Value
1	ROIV	A	\$47,062,045.60
2		D	\$83,915,887.12
3	LYV	A	\$8,071,280.60
4		D	\$59,058,762.30
5	SANM	A	\$34,601,269.20
6		D	\$19,496,558.62
7	NVDA	D	\$44,333,450.00
8	ONC	D	\$30,659,418.82
9	WMT	D	\$30,291,208.96
10	GUBK	A	\$21,155,670.40
11		D	\$0.00
12	CIFR	A	\$0.00
13		D	\$21,086,357.88
14	PCOR	D	\$20,452,528.12
15	CG	D	\$18,129,111.60
16	SOFI	A	\$0.00
17		D	\$17,408,557.78
18	ZM	A	\$0.00
19		D	\$12,792,424.67
20	CRWV	A	\$0.00
21		D	\$12,257,094.53
22	ACM	A	\$0.00
23		D	\$11,978,643.93
24	DAVE	D	\$11,704,739.99
25	FIG	A	\$4,295.22
26		D	\$11,508,100.99
27	GOOGL	A	\$0.00
28		D	\$10,795,857.08
29	GH	A	\$0.00
30		D	\$10,361,756.61
31	QCOM	A	\$0.00
32		D	\$9,335,921.76
33	ONDS	A	\$9,309,753.75
34	AMR	A	\$8,664,935.55
35	DLB	A	\$0.00
36		D	\$8,592,676.13
37	WBD	D	\$8,185,101.75
38	RJF	A	\$0.00
39		D	\$8,388,593.35

Pivot table editor

Value, Post Transaction Value for each Company Name

Sum of Total Transaction Value for each Company Name

Rows

Columns

Values

Filters

Transaction Date

2025-12-17 Pivot Table 2

From this pivot table, you can see that ROIV (Company Name: Roivant Sciences Ltd.) has the most money flowing in and out of it which would most likely create a lot of volatility, meaning a lot of opportunities for traders both on the long and short side. This is just one of the many criterias you can set using Pivot tables to get quality information out of your data and make meaningful decisions in your trading and investing.

Pro Tip: I recommend you use a much longer time frame when filtering with Transaction dates if you are more of a long term investor. Make adjustments depending on the kind of trading/investing you are doing.





## GOOD TRADE SIGNALS WHEN USING INSIDER DATA

Data can tell you a story if you are ready to dig a little bit to find the answers. Below are a few hints and signals you can draw out of the insider data using some of the tips in the InsiderIQ Pro guide.

**Cluster Buys:** The more the merrier, when you see multiple insiders buying or selling a stock at once, all in the same day especially? It would be in your best interest to take a closer look.

**High Insider Purchase Price:** You might not know this but quite regularly you can spot insiders buying their company stock at a higher price than it currently is at or selling at a lower price. This is a really good sign as it shows more conviction on their part and even a sense of urgency to get in on a particular move.

**Large Buys (Number of Shares & Total Transaction Value):** With most brokerages you are able to see the numbers of shares a stock trades on average during a particular amount of time, like its average volume for a month, 6 months and even a year. When you see a sale or purchase have a larger volume than the stock's usual average, that's a good time to pay attention. The volume average you choose for your comparison will depend on if you're day-trading, swing-trading or doing long-term investing. The total transaction value can also show you which stock had the most money put into it or pulled out of it on any given day.

**Consecutive Buys:** When you see buys or sales over multiple days, that's a good sign. Especially when you see the number of shares bought or sold going up with each day. Added bonus if the price the stock is bought at increases with each following day or vice versa for a sale.

Try and find stocks that meet some of the criterias above and let us know if you see that they end up being good signals for you as our research has shown them to be.



## HELPFUL TOOLS ON GOOGLE SHEETS

### Google Finance Functions.

Google finance functions can help you get more financial data into your hands to assist with your analysis. Let's look at a simple function like the one below:

```
=index(GOOGLEFINANCE(CELL1, "PRICE", CELL2),2,2)
```

CELL1: Ticker Symbol

CELL2: Date

### Example:

```
=index(GOOGLEFINANCE(GOGL, "PRICE", 12-03-2025),2,2) = $319.630
```

The following day: =index(GOOGLEFINANCE(GOGL, "PRICE", 12-04-2025),2,2) = \$317.620





My Insider Transactions Database

File Edit View Insert Format Data Tools Extensions Help

D2      =index(GOOGLEFINANCE(B2, "PRICE", C2),2,2)

	A	B	C	D	E	F
1		Ticker Symbol	Date	Price		
2	ZERO-DAY	GOOGL	12-03-2025	319.6300		
3	FOLLOWING DAY	GOOGL	12-04-2025	317.6200		
4	THE WEEK AFTER	GOOGL	12-10-2025	320.2100		
5						
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This simple formula can save you a lot of time by giving you financial data directly in your spreadsheet. Now if I'm testing out a strategy and my data analysis shows a long opportunity in Google, I'd take some time to put my data analysis theory to the test and see if my theory holds up. I'll do this by comparing price changes over time, comparing the price of the stock the day it has an insider transaction that stands out to its price the following day or a week after. You'd just need to change the date in your formula.

Pro Tip: Investors and Traders think in percentages. Using a percentage change formula to see how the price of a stock changed the following day, week or month can help with some cues and strengthen your game plan.

For more information: <https://support.google.com/docs/answer/3093281?hl=en>



## Automate your Workflow with Macros.

After analyzing your data, coming up with some theories, putting them to the test and settling on some conclusions about certain insider transactions that give you predictable moves in the market, you may finally be ready to automate your workflow.

Marcos is a helpful tool within Google sheets under the “Extensions” tab that can help you automate a lot of things from removing duplicates, creating filters, to the creation of your pivot tables. I don't recommend you try to automate the upload of the csv file, but after that you can pretty much automate most things.

To do this, hover your mouse over the Macros option in the drop down menu then click on Record Macros. Then you now have to carry out all the steps listed in this guide, clean up your data, set up your filters then set up your pivot table. Once that is done and your Macros is named, anytime you need those steps carried out after you've imported your data, you can just go to the Macros option and select your Macro and it will then carry out all the steps you previously recorded.





My Insider Transactions Database

Ticker Symbol	Transaction Type	SUM of Total Trans
ROIV	A	\$47,062.04
LYV	D	\$83,015.88
SANM	A	\$8,071.98
NVDA	D	\$59,058,762.30
ONC	D	\$34,601,269.20
WMT	D	\$10,496,558.62
GUBK	A	\$44,333,460.00
CIFR	D	\$30,659,418.82
CG	D	\$30,291,208.96
ZM	D	\$21,155,670.40
SOFI	A	\$0.00
CRWV	D	\$17,408,557.78
ACM	A	\$0.00
GOOGL	D	\$11,978,643.93
DAVE	D	\$11,704,739.99
FIG	A	\$4,295.22
QCOM	D	\$11,508,100.99
ONDS	A	\$10,795,857.08
AMR	A	\$10,361,756.61
DLB	A	\$9,335,921.76
WBD	D	\$9,309,753.75
RJF	A	\$8,964,935.55
RJF	D	\$8,592,676.13
WBD	D	\$8,185,101.75
WBD	A	\$0.00
WBD	D	\$8,138,593.35

Click Record macro and carry out all the steps in your data analysis process you would like automated.

**Caution:** It isn't full proof, you will still need to check on its work, but it does reduce some work on your part over time.



### FINAL THOUGHTS

Finding a diamond in the rough can take some time, we at InsiderIQ Pro are glad to walk alongside you on your journey. This guide will be updated as we discover more ways to extract more quality information from insider transactions. We implore you to get as creative as possible, keep learning and growing your data analysis skills. We would love to hear from you about other ways you have been able to get the most out of the data provided, and are open to any helpful tips and tricks you'd love to share with us and the InsiderIQ Pro community. You can reach us via our email address, [insideriqpro@gmail.com](mailto:insideriqpro@gmail.com).

Congratulations on your new journey, Analysts! Hope to hear from you soon. 😊

