

# THE INDIVIDUAL INVESTOR'S GUIDE TO INVESTMENT WEB SITES

By Jean Henrich



Today, individuals in search of investment data and information need venture no further than their computer screens, where they can tap into the vast resources of the World Wide Web. From stock and market statistics, to financial and retirement planning calculators, from charting services to on-line brokerage accounts—there is probably something helpful to you somewhere on the Web.

Finding it, though, is another matter. While many sites provide in-depth financial statistics, research and other information, other sites are purely promotional, with little or no useful information; even worse, still other sites offer pure junk. In addition, some sites have free access to useful information, while other sites charge a fee. Sorting through various sites to weed out the junk, and to determine their value can result in an enormous investment of your time.

This guide is designed to lower your investment costs and help you more easily find the most useful investment-related Web sites. The AAI staff has spent hours researching various sites, and we present here 254 that are of most interest to individual investors. Included in the listing are details about the information and services each site offers to help you decide whether or not to pay a visit.

## What the Guide Includes

Our focus is on those sites that provide substantial investing information or interactions. We excluded sites that simply describe products or services and do not provide actions beyond taking customer orders.

The list includes stock exchanges, data providers, mutual fund companies, brokerage firms, and government agencies, as well as sites devoted to options and futures, taxes, financial planning, portfolio tracking, foreign investing, and technical analysis. Broker sites are limited to dis-

count brokers and mutual fund sites are limited to no-load and low-load fund families. Investment sites that charge a fee are included, but are identified as fee-based. Many fee-based sites will provide a sample of its data or a demonstration of its service so that visitors to the site can see what is offered.

The list is organized alphabetically by the name of the Web site (second column). To help you identify sites that suit your needs, we give details on the services and information available at each site, along with a short description of the purpose of the site and what types of securities are covered. Keep in mind, however, that Web sites are prone to frequent changes and the details we provide may not match what you find by the time you reach a site listed here.

For further guidance, we also include a rating for each site. The ratings range from one Ⓢ as lowest to five as highest; sites were judged based on content and thoroughness; sites that are fee-based were judged against other fee-based sites, and free sites were judged relative to other free access sites.

## Reading the List

The first column in our investment Web site list provides the Web address for the site, also referred to as the **URL**. Addresses must be entered exactly as shown to reach a site, but sites do change frequently, and if a site moves you may have to perform an Internet search or call the organization to obtain a new URL.

The next column gives the **name** of the site. Many of these are the official sites of investment-related companies and agencies with which you are probably already familiar, such as Standard & Poor's, the New York Stock Exchange, and the SEC (U.S. Securities & Exchange Commission).

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*Jean Henrich is associate editor of the AAI Journal. Research for this article was contributed by AAI staff members John Bajkowski, Kenneth Michal, Maria Crawford Scott, Marie Swick, and Wayne Thorp.*

# THE INDIVIDUAL INVESTOR'S GUIDE TO INVESTMENT WEB SITES



Financial Planning  
Portfolio Tracking

URL	Name of Site	Primary Focus	Cost	Rating	Securities Covered*		
http://www.1040.com	1040.Com	tax information	none	⊕⊕⊕⊕			
http://aarp.sculder.com	AARP Investment Program	mutual funds	none	⊕⊕⊕⊕	fund		
http://www.accutrade.com	AccuTrade	on-line trading	fee	⊕⊕⊕⊕⊕⊕	stk, fixed, int'l, fund, opt/fut		✓
http://www.wanger.com	Acorn Funds	mutual funds	none	⊕⊕⊕⊕	fund		
http://www.ostman.com/alert-ipo	Alert-IPO	IPOs	fee	⊕⊕⊕⊕	stk		
http://www.amcore.com	Amcore Funds	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.aaii.com	American Association of Individual Investors	educational; fund data	fee		stk, fixed, int'l, fund, closed, annty, insur		
http://www.americancentury.com	American Century	mutual funds	none	⊕⊕⊕⊕⊕⊕	stk, fund, opt/fut		✓
http://americanexpress.com	American Express Financial Services	on-line trading	fee	⊕⊕⊕⊕⊕⊕	stk, fund, annty	✓	
http://www.aicpa.org	American Institute of CPAs	regulations	none	⊕⊕⊕⊕			
http://www.amex.com	American Stock Exchange	stock exchange	none	⊕⊕⊕⊕	stk, opt/fut		
http://aw.zacks.com	Analyst Watch on the Internet	analyst estimates	fee	⊕⊕⊕⊕⊕⊕	stk, fund	✓	✓
http://www.andrewpeck.com	Andrew Peck Associates Inc.	on-line trading	fee	⊕⊕⊕	stk, opt/fut		
http://www.reportgallery.com	Annual Report Gallery	company reports	none	⊕⊕⊕⊕			
http://www.aufhauser.com	Aufhauser (K.) & Co.	on-line trading	fee	⊕⊕⊕⊕	stk		
http://www.asc.gov.au	Australian Securities Commission	foreign investing	none	⊕⊕⊕⊕	int'l		
http://www.asx.com.au	Australian Stock Exchange	foreign investing	none	⊕⊕⊕⊕	stk, int'l		
http://www.bankrate.com	Bank Rate Monitor	mortgage calculator	none	⊕⊕⊕⊕⊕⊕	fixed	✓	
http://www.barrons.com	Barron's	finance news & analysis	fee	⊕⊕⊕⊕⊕⊕	stk, fixed, int'l, fund	✓	
http://www.bidwell.com	Bidwell & Co.	on-line trading	fee	⊕⊕⊕	stk, fund		
http://www.bloodhound.com	BloodHound	life insurance	none	⊕⊕⊕	insur	✓	
http://www.bloomberg.com	Bloomberg Financial	finance news & analysis	fee	⊕⊕⊕⊕	fixed, fund, opt/fut		✓
http://www.bradynet.com	Bradynet, Inc.	bonds	none	⊕⊕⊕⊕⊕⊕	fixed, int'l		
http://www.mutualfunds.net	Bull & Bear Funds	mutual funds	none	⊕⊕⊕	fund		
http://www.bullbear.com	Bull & Bear Securities Inc.	on-line trading	fee	⊕⊕⊕	stk, fund, opt/fut		
http://www.businessweek.com	Business Week	finance news & analysis	none	⊕⊕⊕⊕⊕⊕	stk, fixed, int'l, fund, closed, opt/fut		✓
http://cgmfunds.com	CGM Realty Fund	mutual funds	none	⊕⊕⊕	fund		
http://www.cnnfn.com	CNN Financial Network	finance news & analysis	none	⊕⊕⊕⊕	stk, fixed, int'l, fund	✓	
http://www.caltrust.com	California Investment Trust	mutual funds	none	⊕⊕⊕	fund		
http://www.calvertgroup.com	Calvert Group	mutual funds	none	⊕⊕⊕⊕	fund	✓	
http://www.ceres.com	Ceres Securities	on-line trading	fee	⊕⊕⊕	stk, fund, opt/fut		
http://www.cfp-board.org	Certified Financial Planner Board of Standards	investment professionals	none	⊕			
http://www.schwab.com	Charles Schwab & Co.	on-line trading	none	⊕⊕⊕⊕⊕⊕	stk, fixed, int'l, fund, opt/fut		
http://www.cboe.com	Chicago Board Options Exchange (CBOE)	options/futures	none	⊕⊕⊕⊕	stk, opt/fut		
http://www.cbote.com	Chicago Board of Trade (CBOT)	options/futures	fee	⊕⊕⊕⊕	opt/fut		
http://www.cme.com	Chicago Mercantile Exchange	options/futures	none	⊕⊕⊕⊕	opt/fut		
http://chicagostockex.com	Chicago Stock Exchange	stock exchange	none	⊕⊕⊕	stk		
http://www.coopamerica.org	Co-op America	social concerns	none	⊕⊕⊕⊕	fund		
http://www.collegesavings.com	College Savings Bank	educational	none	⊕⊕⊕⊕		✓	
http://www.columbiafunds.com	Columbia Funds	mutual funds	none	⊕⊕⊕⊕	fund		
http://www.cftc.gov	Commodity Futures Trading Commission	options/futures	none	⊕⊕⊕⊕	opt/fut		
http://www.rapidtrade.com	ComputEL Securities	on-line trading	fee	⊕⊕⊕⊕⊕⊕⊕	stk, fund		✓
http://www.accesspt.com/cep	Council on Economic Priorities	social concerns	none	⊕⊕⊕⊕⊕⊕	stk		
http://www.contrarian.com	Crabbe Huson	mutual funds	none	⊕⊕⊕	fund		
http://www.cyberinvest.com	CyberInvest.com	investment Web links	none	⊕⊕⊕⊕⊕⊕			
http://www.dbc.com	Data Broadcasting Corporation	stock/fund data	none	⊕⊕⊕⊕	stk, fixed, int'l, fund, opt/fut		✓
http://www.datek.com	Datek Online	on-line trading	fee	⊕⊕⊕	stk		
http://www.bankofny.com/adr	Depository Receipts On-Line	ADRs	none	⊕⊕⊕⊕⊕⊕	int'l		
http://www.lombard.com	Discover Brokerage Direct	on-line trading	none	⊕⊕⊕⊕⊕⊕	stk, opt/fut, insur		
http://www.djmarkets.com	Dow Jones Markets	stock data	none	⊕⊕⊕⊕	stk, fixed, opt/fut		
http://www.dreyfus.com/funds	Dreyfus	mutual funds	none	⊕⊕⊕⊕	fund		
http://www.dupree-funds.com	Dupree Funds	mutual funds	none	⊕⊕⊕	fund		
http://www.etrade.com	E*Trade Securities	on-line trading	fee	⊕⊕⊕⊕⊕⊕	stk, opt/fut		✓
http://www.equis.com	EQUIS International	technical analysis	none	⊕⊕⊕⊕⊕⊕	stk, closed		
http://www.ebroker.com	eBroker	on-line trading	fee	⊕⊕⊕	stk		
http://www.eclipsefund.com	Eclipse Fund	mutual funds	none	⊕⊕⊕	fund		

## \*Key to Securities Covered:

stk = stocks  
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Financial Planning  
Portfolio Tracking

URL	Name of Site	Primary Focus	Cost	Rating	Securities Covered*	Financial Planning	Portfolio Tracking
http://www.emgmkt.com	Emerging Markets Companies	foreign investing	none	⊕⊕⊕	int'l		
http://www.lowfees.com	Empire Financial Group	on-line trading	fee	⊕⊕	stk		
http://www.e-analytics.com	Equity Analytics	stock data & analysis	none	⊕⊕⊕⊕	stk, fixed, opt/fut, insur	✓	✓
http://www.frbatlanta.org	Federal Reserve Bank of Atlanta	economic data	none	⊕⊕⊕			
http://www.bos.frb.org	Federal Reserve Bank of Boston	economic data	none	⊕⊕⊕			
http://www.frbchi.org	Federal Reserve Bank of Chicago	economic data	none	⊕⊕⊕	fixed		
http://www.clev.frb.org	Federal Reserve Bank of Cleveland	economic data	none	⊕⊕⊕			
http://www.dallasfed.org	Federal Reserve Bank of Dallas	economic data	none	⊕⊕⊕			
http://www.frbkc.org	Federal Reserve Bank of Kansas City	economic data	none	⊕⊕⊕			
http://woodrow.mpls.frb.fed.us	Federal Reserve Bank of Minneapolis	economic data	none	⊕⊕⊕	fixed		
http://www.ny.frb.org	Federal Reserve Bank of New York	economic data	none	⊕⊕⊕	fixed		
http://www.phil.frb.org	Federal Reserve Bank of Philadelphia	economic data	none	⊕⊕⊕	fixed		
http://www.rich.frb.org	Federal Reserve Bank of Richmond	economic data	none	⊕⊕⊕	fixed		
http://www.frbst.org	Federal Reserve Bank of San Francisco	economic data	none	⊕⊕⊕⊕	fixed		
http://www.stls.frb.org	Federal Reserve Bank of St. Louis	economic data	none	⊕⊕⊕	fixed		
http://www.ftc.gov	Federal Trade Commission	regulations	none	⊕⊕⊕			
http://sso.org/fta/fta.html	Federation of Tax Administrators	tax information	none	⊕⊕⊕			
http://www.fidelity.com	Fidelity Investments	mutual funds	none	⊕⊕⊕⊕⊕	stk, fixed, int'l, fund, annty, insur	✓	
http://finnav.com	Financial Navigator International	investment Web links	none	⊕⊕⊕	stk, fund		
http://www.fponline.com	Financial Planning Magazine Online Edition	financial planning	none	⊕⊕⊕		✓	
http://www.ft.com	Financial Times	finance news & analysis	none	⊕⊕⊕			
http://www.financialworld.com	Financial World magazine	finance news & analysis	none	⊕⊕⊕		✓	
http://www.firstcall.com	First Call Corporation	analyst estimates	fee	⊕⊕⊕	stk, fixed, int'l	✓	
http://www.flexfunds.com	Flex Funds	mutual funds	none	⊕⊕	fund		
http://www.pathfinder.com/fortune	Fortune magazine	finance news & analysis	none	⊕⊕⊕		✓	
http://www.founders.com	Founders Funds	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.bourse-de-paris.fr	France-Bourse de Paris	foreign investing	none	⊕⊕⊕	stk, int'l, opt/fut		
http://www.cob.fr	France-Commission Des Operations De Bourse	foreign investing	none	⊕⊕	int'l		
http://www.tresor.finances.fr/oat	France-French Government Securities	foreign investing	none	⊕⊕⊕	fixed, int'l		
http://www.futurestrading.com	Futures Trading Group	options/futures	none	⊕⊕	opt/fut		
http://www.gabelli.com	Gabelli Funds	mutual funds	none	⊕⊕⊕⊕	fund, closed	✓	
http://www.galaxyfunds.com	Galaxy Funds	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.globalfindata.com	Global Financial Data	market data (historical)	none	⊕⊕⊕⊕	stk, fixed		
http://www.goodmoney.com	Good Money	social concerns	none	⊕⊕⊕⊕	fund		
http://www.greenjungle.com	Green Jungle	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.greenmoney.com	GreenMoney On-Line Guide	social concerns	none	⊕⊕⊕	fund		
http://www.hrblock.com	H&R Block	tax information	none	⊕⊕⊕			
http://www.hoovers.com	Hoover's Online	company profiles	none	⊕⊕⊕⊕	stk		
http://www.iaifunds.com	IAI Funds	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.ibcddata.com	IBC Financial Data, Inc.	mutual funds	none	⊕⊕⊕	closed		
http://www.ici.org	ICI Mutual Fund Connection	mutual funds	none	⊕⊕⊕⊕	fund, closed		
http://nestegg.iddis.com	IDD Information Services (Online)	financial planning	none	⊕⊕⊕	stk, fixed, fund, RE, insur		
http://www.invesco.com	INVESCO	mutual funds	none	⊕⊕⊕⊕	fund	✓	
http://www.ipocentral.com	IPO Central	IPOs	none	⊕⊕⊕	stk	✓	
http://www.ipodata.com	IPO Data Systems	IPOs	fee	⊕⊕⊕	stk	✓	
http://www.infofund.com	InfoFund	portfolio tracking	none	⊕⊕⊕	fund		✓
http://www.insure.com	Insurance News Network	life insurance	none	⊕⊕⊕	annty, insur		
http://www.irs.ustreas.gov	Internal Revenue Service	tax information	none	⊕⊕⊕⊕⊕			
http://www.iafp.org	International Association for Financial Planning	investment professionals	none	⊕⊕			
http://www.icefi.com	Internet Closed-End Fund Investor	closed-end funds	fee	⊕⊕⊕⊕	closed		
http://www.investexpress.com	InvestExpress On-Line	on-line trading	fee	⊕⊕⊕	stk		
http://investin.com	InvestIN Securities Corporation	on-line trading	fee	⊕⊕⊕			
http://www.investlink.com	InvestLink	portfolio tracking	none	⊕⊕⊕	stk		✓
http://members.ici.org	Investment Company Institute	mutual funds	none	⊕⊕⊕	fund, closed	✓	✓
http://www.investools.com	Investools	portfolio tracking	fee	⊕⊕⊕⊕	stk, fund, closed	✓	✓
http://www.investorguide.com	Investor Guide	investment Web links	none	⊕⊕⊕	stk, fixed, int'l, fund, opt/fut		✓

## \*Key to Securities Covered:

stk = stocks  
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# THE INDIVIDUAL INVESTOR'S GUIDE TO INVESTMENT WEB SITES



Financial Planning  
Portfolio Tracking

URL	Name of Site	Primary Focus	Cost	Rating	Securities Covered*	Financial Planning	Portfolio Tracking
http://www.investorsquare.com	Investor Square	mutual funds	none	⊕⊕⊕	stk, fund, closed		✓
http://www.investors.com	Investor's Business Daily Web Edition	finance news & analysis	none	⊕⊕⊕⊕	stk, fixed, fund, opt/fut	✓	
http://www.investorweb.com	InvestorWEB	investment Web links	none	⊕⊕			
http://www.investorama.com	Investorama	investment Web links	none	⊕⊕⊕⊕	stk, fixed, fund	✓	
http://www.investorsedge.com	Investors Edge	portfolio tracking	none	⊕⊕⊕	stk, fund		✓
http://www.jboxford.com	J.B. Oxford & Company	on-line trading	fee	⊕⊕	stk		
http://www.mgr.com/mgr/lasser	J.K. Lasser	tax information	none	⊕⊕⊕⊕			
http://www.jackwhiteco.com	Jack White & Company On-Line	on-line trading	fee	⊕⊕⊕⊕	stk, fund		✓
http://www.janusfunds.com	Janus	mutual funds	none	⊕⊕⊕⊕	fund	✓	
http://www.jbfunds.com	Jones and Babson	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.kcibt.com	Kansas City Board of Trade	stock exchange	none	⊕⊕⊕	opt/fut		
http://www.kaufmann.com	Kaufmann	mutual funds	none	⊕⊕	fund		
http://www.kiplinger.com	Kiplinger Online	finance news & analysis	none	⊕⊕⊕	stk, fixed, fund, closed	✓	
http://www.life-line.org	LIFE-Line	life insurance	none	⊕⊕⊕⊕	insur	✓	
http://www.investorsleague.com	League of American Investors	portfolio tracking	none	⊕⊕	stk		✓
http://www.underwriter.com	Life Insurance Analysis Center	life insurance	none	⊕⊕	insur	✓	
http://www.lifenet.com	LifeNet	life insurance	none	⊕⊕⊕	insur	✓	✓
http://www.lindnerfunds.com	Lindner Funds	mutual funds	none	⊕⊕⊕	stk, fund		
http://www.marketguide.com	MarketGuide	stock data	none	⊕⊕⊕⊕		✓	
http://www.markman.com	Markman Funds	mutual funds	none	⊕⊕	fund		
http://www.debary.com	Marquette de Bary Co.	on-line trading	fee	⊕⊕	stk		
http://www.maxule.com	Max Ule	on-line trading	fee	⊕⊕	stk, fixed, fund		
http://www.mgfs.com	Media General Financial Services	stock data	none	⊕⊕⊕	stk		
http://www.merc.com	Mercury Mail	E-mail service	none	⊕⊕	stk		
http://www.investor.msn.com	Microsoft Investor	stock/fund data	fee	⊕⊕⊕⊕	stk, fund		✓
http://www.slip.net/~mmreview	Money Manager Review	investment professionals	none	⊕⊕⊕	fund	✓	✓
http://www.moneypages.com	Moneypages	investment Web links	none	⊕⊕⊕	stk, fixed, fund		
http://www.montgomeryfunds.com	Montgomery Funds	mutual funds	none	⊕⊕⊕	fund		
http://www.moody's.com	Moody's Investors Service	bond ratings	none	⊕⊕⊕	stk, fixed, fund	✓	
http://www.morningstar.net	Morningstar Net	stock/fund data	none	⊕⊕⊕⊕⊕	stk, fund		✓
http://www.giffunds.com	Mosaic Funds	mutual funds	none	⊕⊕⊕	fund		
http://www.muhenkamp.com	Muhenkamp	mutual funds	none	⊕⊕	fund		
http://www.municipal.com	Municipal.Com	muni bonds	none	⊕⊕⊕	fixed		
http://www.msiebert.com	Muriel Siebert & Co.	on-line trading	fee	⊕⊕⊕	stk, fixed, fund, opt/fut		✓
http://www.mfea.com	Mutual Fund Education Alliance	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.dasnet.com	Mutual Fund Encyclopedia	mutual funds	fee	⊕⊕⊕⊕	fund		
http://www.fundmaster.com	Mutual Fund Investors Resource Center	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.brill.com	Mutual Funds Interactive	mutual funds	none	⊕⊕⊕	stk, fixed, int'l, fund, closed, opt/fut		✓
http://www.mfmag.com	Mutual Funds Magazine Online	mutual funds	fee	⊕⊕⊕⊕	fund, closed		✓
http://www.nareit.com	NAREIT Online	REITs	none	⊕⊕⊕	RE		
http://www.nasdr.com	NASD Regulation Inc.	regulations	none	⊕⊕⊕⊕			
http://pawws.com/tni	NET Investor	on-line trading	fee	⊕⊕⊕⊕	stk, fund		✓
http://networth.quicken.com	NETworth	mutual funds	none	⊕⊕⊕⊕	fixed, int'l, fund, closed		✓
http://quotes.quicken.com	NETworth Quotes	stock & fund quotes	none	⊕⊕	stk, fund		
http://www.nasdaq.com	Nasdaq Stock Market	stock exchange	none	⊕⊕⊕⊕	stk		✓
http://www.napfa.org	National Assoc. of Personal Financial Advisors	investment professionals	none	⊕⊕⊕		✓	
http://www.natcorp.com/ir	National Corporate Services, Inc.	investment Web links	none	⊕⊕			
http://www.ndb.com	National Discount Brokers	on-line trading	none	⊕⊕⊕	stk, fund		
http://www.fraud.org	National Fraud Information Center	fraud	none	⊕⊕			
http://www.nelnet.com	Nelson Investment Management Network	investment professionals	none	⊕⊕⊕			
http://www.net-gold.com	Net Chart	stock charts & analysis	none	⊕⊕⊕	stk		✓
http://www.netstockdirect.com	Net Stock Direct	direct stock purchase	none	⊕⊕⊕	stk, int'l		
http://www.nettax.com	Net Tax 9X	tax information	none	⊕⊕⊕		✓	
http://www.nbfunds.com	Neuberger & Berman	mutual funds	none	⊕⊕⊕⊕	fund	✓	
http://www.nyce.com	New York Cotton Exchange	options/futures	none	⊕⊕⊕	opt/fut		
http://www.nymex.com	New York Mercantile Exchange	options/futures	none	⊕⊕⊕	opt/fut		✓

## \*Key to Securities Covered:

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RE = real estate  
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Functions Performed					Information and Documents Provided												
Tracking	Screening	Charting	Brokerage	Downloading	News	Quotes	Financial Data & Ratios	Estimates/Research	Technical Indicators	Industry Data	Market/Economic Data	Financial Planning	Taxes	Educational	Performance	Reports	Links
✓	✓				✓	✓				✓				✓			Investor Square
				✓					✓	✓	✓			✓		✓	Investor's Business Daily Web Edition
					✓	✓								✓		✓	InvestorWEB
					✓	✓								✓		✓	Investorama
					✓	✓	✓			✓						✓	Investors Edge
		✓	✓	✓		✓										✓	J.B. Oxford & Company
						✓						✓				✓	J.K. Lasser
✓	✓	✓	✓		✓	✓	✓	✓		✓						✓	Jack White & Company On-Line
		✓				✓								✓	✓	✓	Janus
		✓				✓						✓		✓	✓	✓	Jones and Babson
					✓	✓		✓		✓				✓	✓	✓	Kansas City Board of Trade
																	Kaufmann
					✓	✓					✓			✓	✓		Kiplinger Online
							✓	✓						✓			LIFE-Line
																	League of American Investors
																	Life Insurance Analysis Center
											✓	✓					LifeNet
			✓												✓	✓	Lindner Funds
✓	✓				✓	✓	✓		✓	✓				✓			MarketGuide
						✓										✓	Markman Funds
			✓														Marquette de Bary Co.
			✓														Max Ule
					✓		✓	✓	✓	✓							Media General Financial Services
					✓												Mercury Mail
✓			✓		✓	✓	✓										Microsoft Investor
											✓				✓		Money Manager Review
														✓			MoneyPages
		✓				✓					✓			✓	✓	✓	Montgomery Funds
✓	✓				✓	✓	✓		✓	✓				✓	✓	✓	Moody's Investors Service
						✓								✓	✓	✓	Morningstar Net
						✓							✓	✓	✓	✓	Mosaic Funds
														✓	✓	✓	Muhlenkamp
			✓		✓	✓				✓							Municipal.Com
					✓		✓										Muriel Siebert & Co.
														✓		✓	Mutual Fund Education Alliance
✓	✓			✓						✓					✓	✓	Mutual Fund Encyclopedia
		✓												✓		✓	Mutual Fund Investors Resource Center
✓					✓	✓	✓		✓	✓				✓			Mutual Funds Interactive
✓						✓								✓	✓		Mutual Funds Magazine Online
									✓	✓				✓	✓		NAREIT Online
														✓			NASD Regulation Inc.
✓	✓		✓		✓	✓	✓			✓							NET Investor
					✓	✓								✓	✓		NETworth
						✓											NETworth Quotes
		✓				✓											Nasdaq Stock Market
											✓						National Assoc. of Personal Financial Advisors
																	National Corporate Services, Inc.
			✓														National Discount Brokers
					✓									✓			National Fraud Information Center
											✓				✓		Nelson Investment Management Network
✓	✓			✓		✓		✓	✓								Net Chart
													✓				Net Stock Direct
													✓				Net Tax 9X
						✓					✓		✓	✓	✓		Neuberger & Berman
	✓			✓		✓				✓				✓			New York Cotton Exchange
	✓				✓	✓								✓			New York Mercantile Exchange

# THE INDIVIDUAL INVESTOR'S GUIDE TO INVESTMENT WEB SITES



Financial Planning  
Portfolio Tracking

URL	Name of Site	Primary Focus	Cost	Rating	Securities Covered*	Financial Planning	Portfolio Tracking
http://www.nyse.com	New York Stock Exchange	stock exchange	none	⊕⊕	stk	✓	
http://www.nikkei.co.jp/enews	Nikkei News (English version)	foreign investing	none	⊕⊕⊕	stk, int'l		
http://www.noload.base.org	No-Load Stocks Info	direct stock purchase	none	⊕⊕	stk		
http://www.nri.co.jp/OR	Nomura Research Institute	foreign investing	none	⊕⊕	stk		
http://www.nasaa.org	North American Securities Administration Assoc.	regulations	none	⊕⊕⊕			
http://www.otcfm.com	OTC Financial Network	small stock profiles	none	⊕⊕⊕	stk		
http://www.oakmark.com	Oakmark Funds	mutual funds	none	⊕⊕	fund		
http://pawws.com	PAWWS Financial Network	stock/fund data & analysis	fee	⊕⊕⊕⊕⊕	stk, fixed, fund, opt/fut		✓
http://www.pbhgfunds.com	PBHG Funds	mutual funds	none	⊕⊕⊕	fund		
http://www.pcfm.com	PC Financial Network	on-line trading	fee	⊕⊕⊕⊕⊕	stk, fixed, fund	✓	✓
http://pnewswire.com	PR Newswire	finance news	none	⊕⊕⊕⊕⊕			
http://www.countrydata.com	PRS Online	foreign investing	fee	⊕⊕⊕			
http://www.tradepbs.com	Pacific Brokerage Services, Inc.	on-line trading	fee	⊕⊕⊕⊕⊕			✓
http://www.paxfund.com	Pax World Fund	mutual funds	none	⊕⊕	fund		
http://www.payden.com	Payden & Rygel	mutual funds	none	⊕⊕	fund		
http://www.netrunner.net/~philfund	Philadelphia Funds	mutual funds	none	⊕⊕	fund		
http://www.phlx.com	Philadelphia Stock Exchange	stock exchange	none	⊕⊕⊕	stk, fund, opt/fut		✓
http://www.pirc.com	Primark Investment Research Center	stock data & analysis	fee	⊕⊕⊕	stk, int'l, fund	✓	
http://www.prars.com	Public Register's Annual Report Service (PRARS)	company reports	none	⊕⊕⊕			
http://www.quick-reilly.com	Quick & Reilly, Inc.	on-line trading	fee	⊕⊕⊕	stk, fund, opt/fut		✓
http://www.quickquote.com	QuickQuote	life insurance	none	⊕⊕⊕	insur	✓	
http://www.qfn.com	Quicken Financial Network	personal finance	none	⊕⊕⊕⊕⊕	stk, fixed, fund, insur	✓	✓
http://www.quote.com	Quote.Com	stock data & analysis	fee	⊕⊕⊕⊕⊕	stk, fund		✓
http://www.quotesmith.com	Quotesmith Corp.	life insurance	none	⊕⊕⊕⊕⊕	insur	✓	
http://www.resicm.com	Real Estate Indexes	real estate	none	⊕⊕⊕	RE		
http://www.money.net.com	Reality Online Inc.	finance news & analysis	none	⊕⊕	stk, fund, opt/fut		✓
http://www.researchmag.com	Research Magazine On-Line	educational	none	⊕⊕⊕⊕⊕	stk, int'l, fund, closed, RE		✓
http://www.reuters.com	Reuters	finance news	none	⊕⊕⊕	stk, fixed, int'l		
http://www.rsim.com	Robertson Stephens Funds	mutual funds	none	⊕⊕⊕	fund		✓
http://www.roycefunds.com	Royce Funds	mutual funds	none	⊕⊕⊕⊕⊕	stk, fund, closed		
http://www.fe.msk.ru	Russian Institute for Commercial Engineering	foreign investing	none	⊕⊕⊕	stk, fixed, int'l		
http://www.seclaw.com	SEC Law .com	regulations	none	⊕⊕			
http://www.sitfunds.com	SIT Funds	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.safecofunds.com	Safeco Funds	mutual funds	none	⊕⊕⊕	fund	✓	
http://www.savoystocks.com	Savoy Discount Brokerage	on-line trading	none	⊕⊕	stk, fund		
http://www.discountbroker.com	Scottsdale Securities	on-line trading	fee	⊕⊕	stk, fund		
http://www.sudder.com	Sudder Funds	mutual funds	none	⊕⊕⊕⊕⊕	fund	✓	
http://www.securetax.com	SecureTax	tax information	none	⊕⊕⊕			
http://www.securitieslaw.com	Securities Fraud & Investor Protection	fraud	none	⊕⊕⊕⊕⊕			
http://www.sia.com	Securities Industry Association	securities industry	none	⊕⊕⊕		✓	
http://www.techstocks.com	Silicon Investor	technology stocks	none	⊕⊕⊕	stk		
http://www.smithbreeden.com	Smith Breeden Funds	mutual funds	none	⊕⊕	fund		
http://www.socialinvest.org	Social Investment Forum	social concerns	none	⊕⊕⊕	fund		
http://www.ssa.gov	Social Security Online	Social Security	none	⊕⊕⊕			
http://www.stockinfo.standardpoor.com	Standard & Poor's Investor Services	stock data	none	⊕⊕⊕	stk		
http://www.stat-usa.gov	Stat-USA	economic data	fee	⊕⊕⊕			
http://www.steinroe.com	SteinRoe Funds	mutual funds	none	⊕⊕⊕⊕⊕	fund	✓	✓
http://www.stockbrokerfraud.com	Stock Investors Fraud Resource	fraud	none	⊕			
http://www.stocksmart.com	Stock Smart	portfolio tracking	none	⊕⊕⊕⊕⊕	stk, int'l, fund, opt/fut		✓
http://www.stockmaster.com	StockMaster	stock/fund data	none	⊕⊕⊕	stk, fund, closed		
http://www.stockwiz.com	StockWiz	stock data	none	⊕⊕⊕⊕⊕	stk, opt/fut		
http://www.stockguide.com	Stockguide	small stock profiles	none	⊕⊕⊕	stk		
http://www.efrontier.com	StreetEYE	investment Web links	none	⊕⊕⊕			
http://www.strong-funds.com	Strong Funds	mutual funds	none	⊕⊕⊕⊕⊕	stk, fund, opt/fut	✓	✓
http://www.sfe.com.au	Sydney Futures Exchange	foreign investing	none	⊕⊕⊕	int'l, opt/fut		
http://www.troweprice.com	T. Rowe Price	mutual funds	none	⊕⊕⊕⊕⊕	stk, fund, closed	✓	✓

## \*Key to Securities Covered:

stk = stocks  
fixed = fixed-income (bonds)

int'l = international  
fund = mutual funds

closed = closed-end funds  
opt/fut = options/futures

RE = real estate  
annty = annuities

insur = insurance products



Functions Performed					Information and Documents Provided												
Screening	Charting	Brokerage	Downloading	News/Groups	News	Quotes	Financial Data & Ratios	Estimates/Research	Technical Indicators	Industry Data	Market/Economic Data	Financial Planning	Taxes	Educational	Performance	Reports	Links
					✓	✓								✓			New York Stock Exchange
					✓				✓	✓							Nikkei News (English version)
											✓					✓	No-Load Stocks Info
														✓		✓	Nomura Research Institute
					✓									✓		✓	North American Securities Administration Assoc.
					✓	✓	✓									✓	OTC Financial Network
					✓	✓									✓	✓	Oakmark Funds
✓		✓			✓	✓	✓	✓	✓	✓						✓	PAWWS Financial Network
					✓	✓	✓	✓							✓	✓	PBHG Funds
✓	✓	✓			✓	✓	✓	✓	✓	✓				✓	✓	✓	PC Financial Network
					✓	✓			✓						✓	✓	PR Newswire
			✓		✓		✓			✓				✓			PRS Online
	✓	✓	✓			✓	✓		✓	✓							Pacific Brokerage Services, Inc.
	✓					✓									✓	✓	Pax World Fund
										✓							Payden & Rygel
																✓	Philadelphia Funds
	✓				✓	✓			✓								Philadelphia Stock Exchange
					✓	✓	✓	✓						✓		✓	Primark Investment Research Center
																✓	Public Register's Annual Report Service (PRARS)
	✓	✓	✓		✓	✓				✓				✓			Quick & Reilly, Inc.
																	QuickQuote
✓	✓				✓	✓			✓	✓	✓	✓					Quicken Financial Network
✓	✓				✓	✓	✓	✓	✓								Quote.Com
							✓										Quotesmith Corp.
													✓				Real Estate Indexes
	✓	✓			✓	✓				✓							Reality Online Inc.
✓	✓				✓	✓	✓				✓			✓	✓		Research Magazine On-Line
	✓	✓			✓	✓				✓						✓	Reuters
	✓					✓	✓								✓	✓	Robertson Stephens Funds
					✓										✓	✓	Royce Funds
																✓	Russian Institute for Commercial Engineering
						✓								✓			SEC Law .com
						✓									✓	✓	SIT Funds
						✓										✓	Safeco Funds
	✓	✓			✓	✓								✓			Savoy Discount Brokerage
		✓			✓	✓					✓					✓	Scottsdale Securities
			✓			✓				✓	✓			✓	✓	✓	Scudder Funds
												✓					SecureTax
														✓			Securities Fraud & Investor Protection
	✓			✓	✓	✓								✓			Securities Industry Association
																✓	Silicon Investor
					✓									✓		✓	Smith Breedon Funds
														✓	✓		Social Investment Forum
					✓		✓				✓	✓					Social Security Online
										✓						✓	Standard & Poor's Investor Services
		✓				✓				✓	✓			✓	✓	✓	Stat-USA
														✓	✓	✓	SteinRoe Funds
✓	✓		✓			✓			✓					✓			Stock Investors Fraud Resource
	✓					✓		✓							✓		Stock Smart
	✓				✓	✓				✓							StockMaster
	✓		✓		✓	✓	✓	✓								✓	StockWiz
					✓	✓				✓							Stockguide
	✓																StreetEYE
	✓	✓			✓	✓			✓					✓	✓	✓	Strong Funds
	✓									✓	✓			✓		✓	Sydney Futures Exchange
	✓	✓				✓	✓			✓	✓	✓	✓	✓	✓	✓	T. Rowe Price

# THE INDIVIDUAL INVESTOR'S GUIDE TO INVESTMENT WEB SITES



Financial Planning  
Portfolio Tracking

URL	Name of Site	Primary Focus	Cost	Rating	Securities Covered*	Financial Planning	Portfolio Tracking
http://www.taxfiler.com	Tax Filer	tax information	fee	⊕⊕		✓	
http://www.taxprophet.com	Tax Prophet	tax information	none	⊕⊕⊕			
http://www.rak-1.com	Tax Tips and Facts	tax information	none	⊕⊕⊕			
http://taxwizard.com	Taxwizard	tax information	none	⊕⊕⊕			
http://www.alphachart.com	Technical Analysis Charting	technical analysis	none	⊕⊕⊕	stk	✓	
http://www.economist.com	The Economist	finance news & analysis	none	⊕⊕⊕⊕			
http://www.mjwhitman.com	Third Avenue Value	mutual funds	none	⊕⊕	fund		
http://www.thomsoninvest.net	Thomson Investors Network	stock/fund data	fee	⊕⊕⊕⊕	stk, fixed, fund		✓
http://www.publicdebt.treas.gov	U.S. Bureau of the Public Debt	bonds	none	⊕⊕⊕	fixed		
http://www.sec.gov	U.S. Securities & Exchange Commission (SEC)	regulations	none	⊕⊕⊕⊕⊕	stk, fund		
http://www.usfunds.com	United Services Funds	mutual funds	none	⊕⊕⊕	fund		
http://www.vanwagoner.com	Van Wagoner Funds	mutual funds	none	⊕⊕	fund		
http://www.vse.com	Vancouver Stock Exchange	foreign investing	none	⊕⊕⊕	stk, int'l		
http://www.vanguard.com	Vanguard	mutual funds	none	⊕⊕⊕⊕⊕	fund, annty	✓	✓
http://www.vusa.com	Vontobel	mutual funds	none	⊕⊕	fund		
http://www.websontheweb.com	WEBS	index fund products	none	⊕⊕	fund		
http://www.wsdlinc.com	Wall St. Directory	fin'l service clearinghouse	none	⊕⊕⊕			
http://www.wsaccess.com	Wall Street Access	on-line trading	none	⊕⊕⊕	stk, opt/fut	✓	✓
http://www.wallstreetcity.com	Wall Street City	stock screening	none	⊕⊕⊕⊕⊕	stk, int'l, fund	✓	✓
http://wsj.com	Wall Street Journal Interactive Edition	finance news & analysis	fee	⊕⊕⊕⊕	stk, fixed, int'l, fund	✓	✓
http://www.netresource.com/wsn	Wall Street Net	IPOs	none	⊕⊕⊕	stk		
http://www.wsrn.com	Wall Street Research Net	investment Web links	none	⊕⊕⊕⊕	stk, fund		
http://www.wallst.com	WallSt.com	stock data	fee	⊕⊕⊕	stk, fund		✓
http://www.waterhouse.com	Waterhouse Securities	on-line trading	fee	⊕⊕	stk, fixed, fund, opt/fut		✓
http://www.oakassociates.com	White Oak Growth	mutual funds	none	⊕⊕	fund		
http://www.wmblair.com	William Blair Funds	mutual funds	none	⊕⊕	fund		
http://www.sharpe.stanford.edu	William F. Sharpe's Home Page	educational	none	⊕⊕⊕⊕⊕		✓	✓
http://www.younginvestor.com	Young Investor	educational	none	⊕⊕⊕⊕			
http://www.zacks.com	Zacks Investment Research	analyst estimates	none	⊕⊕⊕	stk, fund		✓
http://www.myagent.com	Zacks Portfolio Alert	E-mail service	none	⊕⊕⊕	stk, fund		✓

## \*Key to Securities Covered:

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insur = insurance products

(Continued from page WEB 1)

Other sites began as on-line providers, and are less well-known to the general public. While familiarity with a site provider can serve as one guide to the dependability of the information provided, prudence and good judgment on your part should always prevail.

The **primary focus** column gives you an idea of the general investment area to which the site is primarily devoted. Some sites defy classification by offering multiple services; in these cases we assigned one category that best describes the major focus of the site. The checkmarks across the page fill in the details as to the range of content provided. For example, the Fidelity Investments site lists 'mutual funds' as the site's pri-

mary focus, but the site also provides information on a range of securities and offers on-line trading services, as well.

The **cost** column displays the words **none** or **fee**, showing whether the site content is free or fee-based. Sites may offer some content for free and charge for other content; if most of the valuable investing information available at the site must be paid for, the column is marked 'fee.'

The **rating** compares the site to other sites with a similar focus and cost policy—mutual fund company sites are rated against other mutual fund sites and stock data providers are compared to other stock data providers. Ratings range from a low of one ⊕ to a high of five. Highly-rated sites do not necessarily have numerous

checkmarks across the list; a site may focus on only one particular area of investing but provide substantial information and services in that area.

The **securities covered** column shows you what investment vehicles the site provides information on. These can include stocks (**stk**), fixed-income (**fixed**), international (**int'l**), mutual funds (**fund**), closed-end funds (**closed**), options and futures (**opt/fut**), real estate (**RE**), annuities (**annty**), and insurance products (**insur**). Note that some sites do not provide information on specific securities, but do have useful investment-related information (for instance, tax-related sites); these sites would not have any markings in this column.

The **Functions Performed** section details investing-related actions that



strength measures and momentum indicators look at security price movement. Sites may provide **industry data** to give you information on particular segments of the market. When data is provided on a market—for example, the S&P 500—or the economy—such as interest rates—the column **market/economic data** is checked.

**Financial planning** encompasses information on budgeting, retirement planning, and estate planning. **Taxes** includes tax forms and tips on handling your taxes. **Educational** refers to information made available that can help you learn more about specific investing topics. **Performance** is checked for sites that provide return figures so that you can judge how a security has performed over time. **Reports** is checked if the site allows you to order company or fund prospectuses or annual reports on-line.

**Links** give you the ability to access other Web sites through the current site. Most sites provide these pathways to related information, which you access by simply clicking on the name of the link (usually underlined or shown in a different color). For

example, a site that lists companies with dividend reinvestment plans may include links to each company's home page or to the SEC database of company reports so that you can quickly obtain more information about the firm. Other sites may contain an area with a list of interesting investing Web sites that you can click on to access.

### Using the Guide


To visit the sites listed in the guide, you need a computer with a modem, an Internet service provider and a Web browser.

Once connected to the Internet, simply type the Web URL into the address window at your service provider's home page and press enter. This takes you to the home page of the site. The baud rate (speed) at which your modem connected to the Internet will determine how fast the home page is brought up onto your computer screen.

From here, you can explore the contents of the site. If you are unsure about who is responsible for the information presented at a particular

site, check the bottom of the home page for a link to a company or person's name or look for an "About" icon. Not all sites will be clear as to where the information is coming from however, so be wary and do not accept information as "fact" just because it has popped up on your computer screen.

When exploring a site, it's easy to get lost after clicking on several icons or links that take you to different pages on the site or take you to other sites. Web browsers provide "back" and "forward" buttons so that you can retrace your steps or return to a particular page. You can tell if a click of your mouse has taken you to a link outside of the site by checking the URL in the address window—it will either be a long extension of the original URL you entered or a completely different URL.

If you pan through the sands of the Internet, you really can find valuable nuggets of investment information. This Guide will lead you to the best prospecting sites on the Internet, and as long as you view your prospects with a critical eye, you should be able to hit pay dirt. 

AMERICAN ASSOCIATION OF INDIVIDUAL INVESTORS  
625 North Michigan Avenue, Chicago, Illinois 60611

(800) 428-2244

(312) 280-0170

E-mail: [members@aaii.com](mailto:members@aaii.com)

Web site: [www.aaii.com](http://www.aaii.com)