

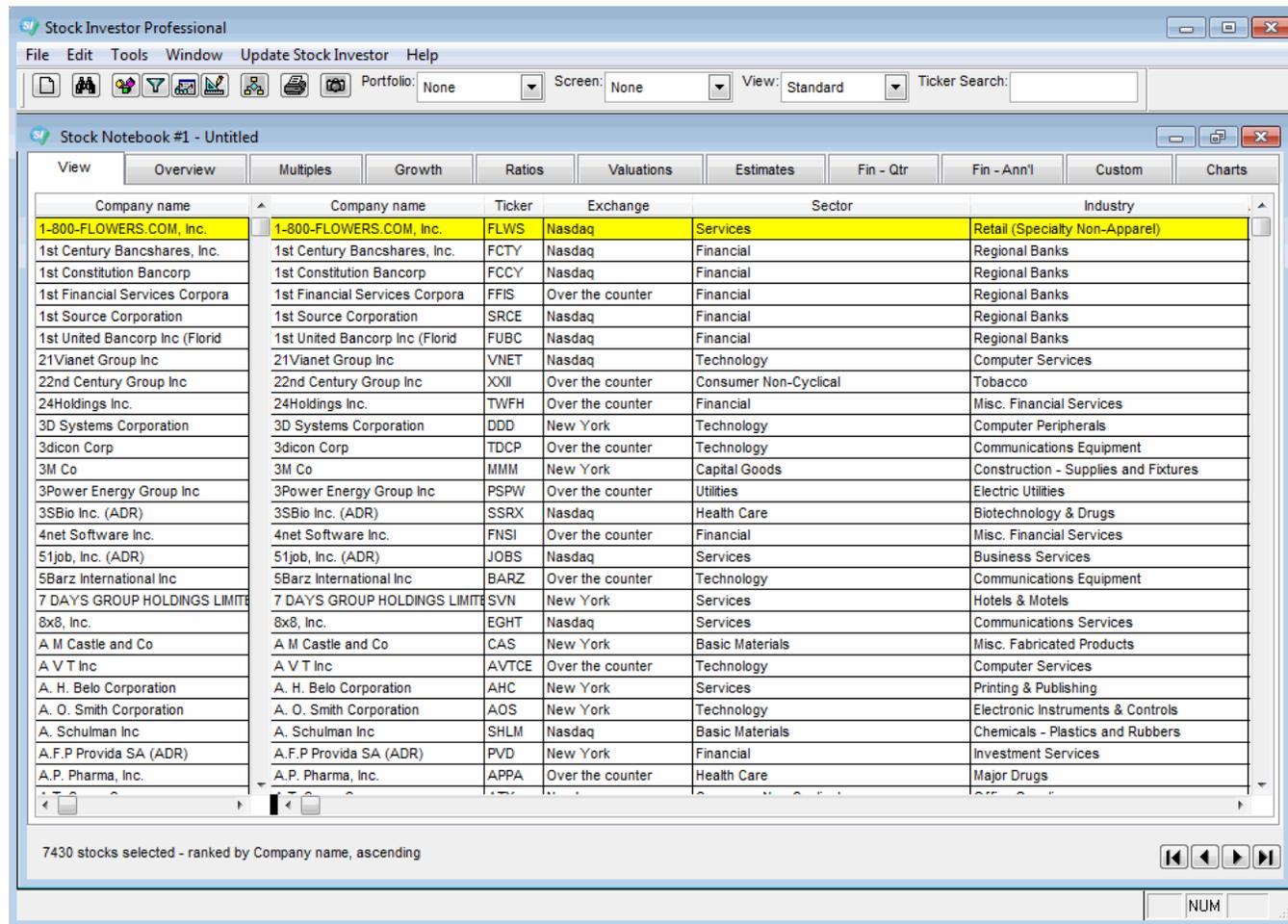
Stock Notebook

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What is the Stock Notebook?

One of the basic tasks that you will want to accomplish with Stock Investor Pro is to access company data and view it on your computer screen. Stock Investor provides an easy way to access and view stock data. It starts with the **Stock Notebook**, which is the first window that you are presented with when starting the program:



The Stock Investor Notebook is the work area where the user can browse through companies in a list format and choose them individually to receive in-depth information. This is accomplished by the use of data Views and the different financial tabs.

The financial tabs are listed across the top of the Notebook window.

Before clicking on any of the tabs at the top, make sure that the company you want to research is highlighted in yellow. You can do this by single-clicking a company. By clicking on any one of these tabs, you can go directly to that information for the company highlighted in yellow from the list.

Notebook Tabs

Individual company data is organized into tabs on the Stock Notebook. These tabs contain related data for easier navigation.

The Tabs and sub-tabs accessible from the Stock Notebook include:

- View
- Overview
 - Description
 - Prices
 - Share Statistics
 - DRPs
- Multiples
- Growth
- Ratios
- Valuations
- Estimates
- Fin - Qtr
 - Financial Information
 - Percent Change One Year Ago
- Fin - Ann'l
 - Total
 - Per Share

- Percent Change
- Common Size
- Custom
- Charts

Stock Notebook "Template"

The Stock Notebook is also used for applying different screens, portfolios and views. In effect, it is a template made up of a portfolio, stock screen, data view, and ranking scheme. In this way you can customize certain functions to streamline your analysis process.

When you first open the program, the default Stock Notebook has no portfolio or screen loaded. However, the default data view is the Standard view and the companies in the Stock Notebook are placed in alphabetical order (Company Name, Ascending):

The screenshot shows the 'Stock Investor Professional' application window. The 'Stock Notebook #1 - Untitled' window is active, displaying a table of stock data. The table has columns for Company name, Ticker, Exchange, Sector, and Industry. The first row is highlighted in yellow: 1-800-FLOWERS.COM, Inc. (FLWS) on Nasdaq, Services sector, Retail (Specialty Non-Apparel) industry. The status bar at the bottom indicates '7430 stocks selected - ranked by Company name, ascending'. Three dropdown menus in the top toolbar are circled in red: 'Portfolio: None', 'Screen: None', and 'View: Standard'.

Company name	Company name	Ticker	Exchange	Sector	Industry
1-800-FLOWERS.COM, Inc.	1-800-FLOWERS.COM, Inc.	FLWS	Nasdaq	Services	Retail (Specialty Non-Apparel)
1st Century Bancshares, Inc.	1st Century Bancshares, Inc.	FCTY	Nasdaq	Financial	Regional Banks
1st Constitution Bancorp	1st Constitution Bancorp	FCCY	Nasdaq	Financial	Regional Banks
1st Financial Services Corpora	1st Financial Services Corpora	FFIS	Over the counter	Financial	Regional Banks
1st Source Corporation	1st Source Corporation	SRCE	Nasdaq	Financial	Regional Banks
1st United Bancorp Inc (Florid	1st United Bancorp Inc (Florid	FUBC	Nasdaq	Financial	Regional Banks
21Vianet Group Inc	21Vianet Group Inc	VNET	Nasdaq	Technology	Computer Services
22nd Century Group Inc	22nd Century Group Inc	XXII	Over the counter	Consumer Non-Cyclical	Tobacco
24Holdings Inc.	24Holdings Inc.	TWFH	Over the counter	Financial	Misc. Financial Services
3D Systems Corporation	3D Systems Corporation	DDD	New York	Technology	Computer Peripherals
3dicon Corp	3dicon Corp	TDCP	Over the counter	Technology	Communications Equipment
3M Co	3M Co	MMM	New York	Capital Goods	Construction - Supplies and Fixtures
3Power Energy Group Inc	3Power Energy Group Inc	PSPW	Over the counter	Utilities	Electric Utilities
3SBio Inc. (ADR)	3SBio Inc. (ADR)	SSRX	Nasdaq	Health Care	Biotechnology & Drugs
4net Software Inc.	4net Software Inc.	FNSJ	Over the counter	Financial	Misc. Financial Services
51job, Inc. (ADR)	51job, Inc. (ADR)	JOBS	Nasdaq	Services	Business Services
5Barz International Inc	5Barz International Inc	BARZ	Over the counter	Technology	Communications Equipment
7 DAYS GROUP HOLDINGS LIMITE	7 DAYS GROUP HOLDINGS LIMITE	SVN	New York	Services	Hotels & Motels
8x8, Inc.	8x8, Inc.	EGHT	Nasdaq	Services	Communications Services
A M Castle and Co	A M Castle and Co	CAS	New York	Basic Materials	Misc. Fabricated Products
A V T Inc	A V T Inc	AVTCE	Over the counter	Technology	Computer Services
A. H. Belo Corporation	A. H. Belo Corporation	AHC	New York	Services	Printing & Publishing
A. O. Smith Corporation	A. O. Smith Corporation	AOS	New York	Technology	Electronic Instruments & Controls
A. Schulman Inc	A. Schulman Inc	SHLM	Nasdaq	Basic Materials	Chemicals - Plastics and Rubbers
A.F.P Provida SA (ADR)	A.F.P Provida SA (ADR)	PVD	New York	Financial	Investment Services
A.P. Pharma, Inc.	A.P. Pharma, Inc.	APPA	Over the counter	Health Care	Major Drugs

However, you can customize a notebook by selecting a portfolio, screen, view, and/or ranking and then save the Notebook for future use.

In this example, we have loaded the *Neff, John screen as well as a custom view (Web-Neff) as well as ranked the Stock Notebook in ascending order by the dividend-adjusted PEG ratio (PE to Div adj EPS Est growth):

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Stock Investor Professional

File Edit Tools Window Update Stock Investor Help

Portfolio: None Screen: **Neff, John** View: **Web-Neff** Ticker Search:

Stock Notebook #1 - Untitled

Company name	Company name	Ticker	Exchange	Price	PE	Ind. PE	Yield	EPS Growth Est	PE to Div adj EPS Est grow
Cray Inc.	Cray Inc.	CRAY	Nasdaq	21.160	5.0	10.7	0.0	20.000	0.3
Kulicke and Soffa Industries I	Kulicke and Soffa Industries I	KLIC	Nasdaq	11.560	5.6	20.9	0.0	15.000	0.4
Strayer Education Inc	Strayer Education Inc	STRA	Nasdaq	47.360	8.2	14.8	8.4	10.200	0.4
Radware Ltd.	Radware Ltd.	RDWR	Nasdaq	14.990	5.5	19.4	0.0	15.525	0.4
Inter Parfums, Inc.	Inter Parfums, Inc.	IPAR	Nasdaq	28.970	6.8	22.6	1.7	12.000	0.5
Companhia de Saneamento Basic	Companhia de Saneamento Basic	SBS	New York	14.300	10.2	19.8	8.5	11.500	0.5
Herbalife Ltd.	Herbalife Ltd.	HLF	New York	39.710	9.3	22.6	3.0	14.933	0.5
CACI International Inc	CACI International Inc	CACI	New York	58.490	9.4	26.2	0.0	15.425	0.6
Apollo Group Inc	Apollo Group Inc	APOL	Nasdaq	18.370	6.8	14.8	0.0	11.750	0.6
Republic Airways Holdings Inc.	Republic Airways Holdings Inc.	RJET	Nasdaq	11.190	11.0	14.7	0.0	18.800	0.6
DFC Global Corp	DFC Global Corp	DLLR	Nasdaq	13.500	10.6	12.9	0.0	17.250	0.6
CF Industries Holdings, Inc.	CF Industries Holdings, Inc.	CF	New York	186.510	6.5	16.7	0.9	9.200	0.6
Delek US Holdings, Inc.	Delek US Holdings, Inc.	DK	New York	36.090	7.8	15.7	1.1	11.917	0.6
Allied World Assurance Co Hold	Allied World Assurance Co Hold	AWH	New York	90.810	7.6	12.7	1.7	10.000	0.6
hhgregg, Inc.	hhgregg, Inc.	HGG	New York	13.510	7.1	17.5	0.0	12.500	0.6
Giant Interactive Group Inc (A	Giant Interactive Group Inc (A	GA	New York	7.490	11.3	23.3	5.6	12.833	0.6
Helen of Troy Limited	Helen of Troy Limited	HELE	Nasdaq	34.880	9.8	23.5	0.0	15.000	0.7
Joy Global Inc.	Joy Global Inc.	JOY	New York	56.520	7.9	16.4	1.2	10.825	0.7
Tesoro Corporation	Tesoro Corporation	TSO	New York	53.400	10.2	15.7	1.5	12.793	0.7
Reinsurance Group of America I	Reinsurance Group of America I	RGA	New York	62.550	6.7	12.1	1.5	7.500	0.7
USANA Health Sciences, Inc.	USANA Health Sciences, Inc.	USNA	New York	56.420	11.7	24.1	0.0	18.000	0.7
Continental AG (ADR)	Continental AG (ADR)	CTTAY	Over the counter	118.550	9.6	14.0	2.5	11.100	0.7
Oil States International, Inc.	Oil States International, Inc.	OIS	New York	89.360	11.9	21.3	0.0	17.250	0.7
Validus Holdings, Ltd.	Validus Holdings, Ltd.	VR	New York	38.610	8.0	12.3	3.1	9.000	0.7
Select Medical Holdings Corpor	Select Medical Holdings Corpor	SEM	New York	8.250	7.9	16.2	0.0	11.667	0.7

25 stocks selected - ranked by PE to Div adj EPS Est growth, ascending

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If we want, we can save this Notebook so, in the future, we can open it to have the specified screen, view, and ranking applied automatically.

To save a Notebook, click on the **File** menu and select **Save Notebook** (File--Save Notebook):

Stock Investor Professional

File Edit Tools Window Update Stock Investor Help

Portfolio: None Screen: *Neff, John View: Web-Neff Ticker Search:

Save As Notebook

Company name	Ticker	Exchange	Price	PE	Ind. PE	Yield	EPS Growth Est	PE to Div adj EPS Est grow
Apollon Group Inc	APOL	Nasdaq	18.370	6.8	14.8	0.0	11.750	0.6
Republic Airways Holdings Inc.	RJET	Nasdaq	11.190	11.0	14.7	0.0	18.800	0.6
DFC Global Corp	DLLR	Nasdaq	13.500	10.6	12.9	0.0	17.250	0.6
CF Industries Holdings, Inc.	CF	New York	186.510	6.5	16.7	0.9	9.200	0.6
Delek US Holdings, Inc.	DK	New York	36.090	7.8	15.7	1.1	11.917	0.6
Allied World Assurance Co Hold	AWH	New York	90.810	7.6	12.7	1.7	10.000	0.6
hhgregg, Inc.	HGG	New York	13.510	7.1	17.5	0.0	12.500	0.6
Giant Interactive Group Inc (A)	GA	New York	7.490	11.3	23.3	5.6	12.833	0.6
Helen of Troy Limited	HELE	Nasdaq	34.880	9.8	23.5	0.0	15.000	0.7
Joy Global Inc.	JOY	New York	56.520	7.9	16.4	1.2	10.825	0.7
Tesoro Corporation	TSO	New York	53.400	10.2	15.7	1.5	12.793	0.7
Reinsurance Group of America I	HGA	New York	62.550	6.7	12.1	1.5	7.500	0.7
USANA Health Sciences, Inc.	USNA	New York	56.420	11.7	24.1	0.0	18.000	0.7
Continental AG (ADR)	CTAY	Over the counter	118.550	9.6	14.0	2.5	11.100	0.7
Oil States International, Inc.	OIS	New York	89.360	11.9	21.3	0.0	17.250	0.7
Validus Holdings, Ltd.	VR	New York	38.610	8.0	12.3	3.1	9.000	0.7
Select Medical Holdings Corpor	SEM	New York	8.250	7.9	16.2	0.0	11.667	0.7

25 stocks selected - ranked by PE to Div adj EPS Est growth, ascending

Saves the current notebook under a new name

You can then specify the name of the Notebook:

Save Notebook

Name: Neff

Description: Run Neff screen, load Web-Neff view and rank results by dividend-adjusted forward PEG ratio in ascending order

Ok Cancel

When you are finished, click **Ok**.

To open a Notebook you have previously saved, again click on the **File** menu and then select **Open Notebook** (File--Open Notebook) or press the Control and O keys (Ctrl + O):

Canvas Wiki

The screenshot shows the 'Stock Investor Professional' application window. The 'File' menu is open, with 'Open Notebook' selected. A dialog box titled 'Open Notebook' is displayed in the foreground, showing a list of notebooks. The 'Neff' notebook is highlighted. The background shows a stock list with columns for company name, ticker, exchange, price, PE, Ind. PE, Yield, EPS Growth Est, PE to Div adj, and EPS Est growth. The 'Neff' notebook is selected in the dialog box.

Company name	Ticker	Exchange	Price	PE	Ind. PE	Yield	EPS Growth Est	PE to Div adj	EPS Est growth
Soffa Industri				10.7	0.0	20.000	0.3		
ation Inc				20.9	0.0	15.000	0.4		
				14.8	8.4	10.200	0.4		
				19.4	0.0	15.525	0.4		
				22.6	1.7	12.000	0.5		
				19.8	8.5	11.500	0.5		
				22.6	3.0	14.933	0.5		
				26.2	0.0	15.425	0.6		
				14.8	0.0	11.750	0.6		
				14.7	0.0	18.800	0.6		
				12.9	0.0	17.250	0.6		
				16.7	0.9	9.200	0.6		
				15.7	1.1	11.917	0.6		
				12.7	1.7	10.000	0.6		
				17.5	0.0	12.500	0.6		
				23.3	5.6	12.833	0.6		
				23.5	0.0	15.000	0.7		
				16.4	1.2	10.825	0.7		
				15.7	1.5	12.793	0.7		
				12.1	1.5	7.500	0.7		
				24.1	0.0	18.000	0.7		
				14.0	2.5	11.100	0.7		
				89.360	11.9	21.3	0.0	17.250	0.7
				38.610	8.0	12.3	3.1	9.000	0.7
				8.250	7.9	16.2	0.0	11.667	0.7

Select the Notebook you wish to open and Stock Investor will apply the portfolio, screen, view, and rank associated with that Notebook:

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Stock Investor Professional

File Edit Tools Window Update Stock Investor Help

Portfolio: None Screen: Web-Neff View: Web-Neff Ticker Search:

Stock Notebook #2 - Neff

View Overview Multiples Growth Ratios Valuations Estimates Fin - Qtr Fin - Ann'l Custom Charts

Company name	Company name	Ticker	Exchange	Price	PE	Ind. PE	Yield	EPS Growth Est	PE to Div adj EPS Est grow
Cray Inc.	Cray Inc.	CRAY	Nasdaq	21.160	5.0	10.7	0.0	20.000	0.3
Radware Ltd.	Radware Ltd.	RDWR	Nasdaq	14.990	5.5	19.4	0.0	15.525	0.4
Kulicke and Soffa Industries I	Kulicke and Soffa Industries I	KLIC	Nasdaq	11.560	5.6	20.9	0.0	15.000	0.4
CF Industries Holdings, Inc.	CF Industries Holdings, Inc.	CF	New York	186.510	6.5	16.7	0.9	9.200	0.6
Reinsurance Group of America I	Reinsurance Group of America I	RGA	New York	62.550	6.7	12.1	1.5	7.500	0.7
Inter Parfums, Inc.	Inter Parfums, Inc.	IPAR	Nasdaq	28.970	6.8	22.6	1.7	12.000	0.5
Apollo Group Inc	Apollo Group Inc	APOL	Nasdaq	18.370	6.8	14.8	0.0	11.750	0.6
hhgregg, Inc.	hhgregg, Inc.	HGG	New York	13.510	7.1	17.5	0.0	12.500	0.6
Allied World Assurance Co Hold	Allied World Assurance Co Hold	AWH	New York	90.810	7.6	12.7	1.7	10.000	0.6
Delek US Holdings, Inc.	Delek US Holdings, Inc.	DK	New York	36.090	7.8	15.7	1.1	11.917	0.6
Joy Global Inc.	Joy Global Inc.	JOY	New York	56.520	7.9	16.4	1.2	10.825	0.7
Select Medical Holdings Corpor	Select Medical Holdings Corpor	SEM	New York	8.250	7.9	16.2	0.0	11.667	0.7
Validus Holdings, Ltd.	Validus Holdings, Ltd.	VR	New York	38.610	8.0	12.3	3.1	9.000	0.7
Strayer Education Inc	Strayer Education Inc	STRA	Nasdaq	47.360	8.2	14.8	8.4	10.200	0.4
Herbalife Ltd.	Herbalife Ltd.	HLF	New York	39.710	9.3	22.6	3.0	14.933	0.5
CACI International Inc	CACI International Inc	CACI	New York	58.490	9.4	26.2	0.0	15.425	0.6
Continental AG (ADR)	Continental AG (ADR)	CTTAY	Over the counter	118.550	9.6	14.0	2.5	11.100	0.7
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Tesoro Corporation	Tesoro Corporation	TSO	New York	53.400	10.2	15.7	1.5	12.793	0.7
Companhia de Saneamento Basic	Companhia de Saneamento Basic	SBS	New York	14.300	10.2	19.8	8.5	11.500	0.5
DFC Global Corp	DFC Global Corp	DLLR	Nasdaq	13.500	10.6	12.9	0.0	17.250	0.6
Republic Airways Holdings Inc.	Republic Airways Holdings Inc.	RJET	Nasdaq	11.190	11.0	14.7	0.0	18.800	0.6
Giant Interactive Group Inc (A	Giant Interactive Group Inc (A	GA	New York	7.490	11.3	23.3	5.6	12.833	0.6
USANA Health Sciences, Inc.	USANA Health Sciences, Inc.	USNA	New York	56.420	11.7	24.1	0.0	18.000	0.7
Oil States International, Inc.	Oil States International, Inc.	OIS	New York	89.360	11.9	21.3	0.0	17.250	0.7

25 stocks selected - ranked by PE, ascending

(c) 1997-2012 American Association of Individual Investors. Month-End data as of 05/03/13. Current (Weekly) data as of 05/03/13.

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