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AAII



Secrets of Smart Stock Screening: Mastering Stock Investor Pro

Discussion Overview

Overview of
*Stock
Investor Pro*



Key Program
Features &
Functionality



User
Resources

What is *Stock Investor Pro*?



Stock Investor Details

- Windows software (not an app)
 - Any system running supported versions of Windows can run Stock Investor
 - Mac users can run Windows using emulation software
- Universe of ~6,700 U.S.-listed stocks
 - New York, NYSE Amex, Nasdaq and OTC listings
 - 1,400+ ADRs
 - Minimum filing, trading and liquidity requirements
- Daily data updates

Stock Investor Data

- Data from S&P Global Market Intelligence
- Detailed financial statement data
 - Last 7 years
 - Last 8 quarters
- Financial ratios and multiples
 - 7 years
 - Sector/industry medians
 - % rank against entire universe
 - Historical averages for 3, 5 and 7 years
- Historical growth rates
 - 3-, 5- and 7-year
- Earnings estimates
 - Current and next 2 fiscal years
 - Current and next fiscal quarters
 - Upgrades and downgrades

Normalized vs. As-Reported Data

As-Reported Data

- Definition: Financial data provided directly by companies in their financial statements (10-K, 10-Q, etc.).
- Source: Derived from GAAP, IFRS, or other local accounting standards.
- Challenges:
 - Inconsistencies in accounting methods across companies, industries, and regions.
 - Non-recurring items, extraordinary gains/losses, and one-time adjustments can distort comparability.
 - Differences in revenue recognition, depreciation, and other accounting treatments.

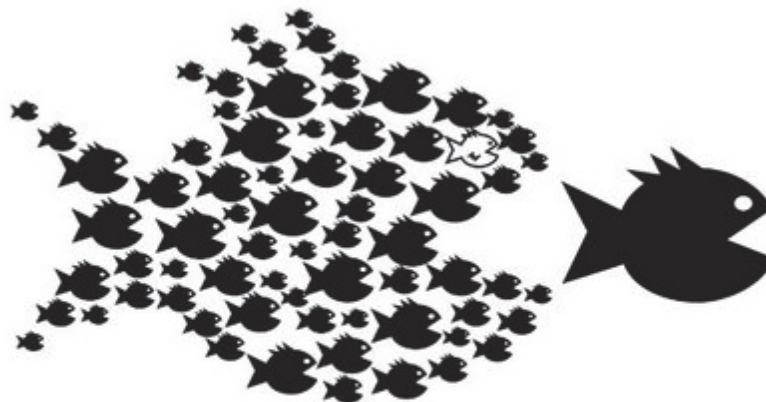
Normalized/Standardized Data

- Definition: Adjusted financial data that ensures comparability across companies, industries, and geographies.
- Adjustments Include:
 - Removing non-recurring items (e.g., restructuring costs, impairment charges).
 - Standardizing revenue and expense recognition methodologies.
 - Converting financials to a common reporting framework.
- Benefits:
 - Enhances cross-company and historical comparisons.
 - Improves accuracy in financial modeling and valuation.
 - Helps investors make data-driven decisions.

What Can *Stock Investor* Do For You?



What Can *Stock Investor* Do For You?



ORGANIZE!

NAVIGATING STOCK INVESTOR PRO

Stock Notebook #1—Untitled

The screenshot shows the 'Stock Notebook #1—Untitled' window. The 'View' tab is selected, and the 'Default tab' is highlighted. The table below lists the companies in the notebook. The first company, '1-800-FLOWERS.COM, Inc.', is highlighted in yellow, indicating it is the 'active' company. The number '6713' at the bottom indicates the total number of stocks selected, ranked by company name, ascending.

Company name	Ticker	Exchange	Sector	Industry	ADR/ADS	StockDow	stoc
1-800-FLOWERS.COM, Inc.	FLWS	Nasdaq	Consumer Discretionary	Specialty Retail	No	None	
10x Genomics, Inc.	TXG	Nasdaq	Health Care	Life Sciences Tools & Services	No	None	
111, Inc.	111	Nasdaq	Consumer Staples	Consumer Staples Distribution & Retail	Yes	None	
17 Education & Technology Group				Other Services	Yes	None	
180 Life Sciences Corp.					No	None	
1847 Holdings LLC				erates	No	None	
1895 Bancorp of Wisconsin, Inc.	BCOW	Nasdaq	Financials	Banks	No	None	
1st Colonial Bancorp, Inc.	FCOB	Over the counter	Financials	Banks	No	None	
1st Source Corporation	SRCE	Nasdaq	Financials	Banks	No	None	
1ST SUMMIT BANCORP of Johnstown, Inc.	FSMK	Over the counter	Financials	Banks	No	None	
1stdibs.Com, Inc.	DIBS	Nasdaq	Consumer Discretionary	Broadline Retail	No	None	
22nd Cent			sumer Staples	Tobacco	No	None	
23andMe			th Care	Health Care Providers & Services	No	None	

6713 stocks selected - ranked by Company name, ascending

Company-Specific Data

Stock Investor Professional

File Edit Tools Window Help

Portfolio: None Screen: None View: Standard Ticker Search:

Stock Notebook #1 - Untitled

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

Company name	Ticker	Exchange	Sector	Industry	ADR/ADS	Stock Dow stoc
1-800-FLOWERS.COM, Inc.	FLWS	Nasdaq	Consumer Discretionary	Specialty Retail	No	None
10x Genomics, Inc.	TXG	Nasdaq	Health Care	Life Sciences Tools & Services	No	None
111, Inc.	YI	Nasdaq	Consumer Staples	Consumer Staples Distribution & Retail	Yes	None
17 Education & Technology Group Inc.	YQ	Nasdaq	Consumer Discretionary	Diversified Consumer Services	Yes	None
180 Life Sciences Corp.	ATNF	Nasdaq	Health Care	Biotechnology	No	None
1847 Holdings LLC	EFSH	NYSE American	Industrials	Industrial Conglomerates	No	None
1895 Bancorp of Wisconsin, Inc.	BCOW	Nasdaq	Financials	Banks	No	None
1st Colonial Bancorp, Inc.	FCOB	Over the counter	Financials	Banks	No	None
1st Source Corporation	SRCE	Nasdaq	Financials	Banks	No	None
1ST SUMMIT BANCORP of Johnstown, Inc.	FSMK	Over the counter	Financials	Banks	No	None
1stdibs.Com, Inc.	DIBS	Nasdaq	Consumer Discretionary	Broadline Retail	No	None
22nd Century Group, Inc.	XXII	Nasdaq	Consumer Staples	Tobacco	No	None
23andMe Holding Co.	ME	Nasdaq	Health Care	Health Care Providers & Services	No	None

6713 stocks selected - ranked by Company name, ascending

NUM

Finding a Company

Stock Investor Professional

File Edit Tools Window Help

Portfolio: None Screen: None View: Standard Ticker Search:

Stock Notebook #1 - Untitled

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

Find Stock Issue

Find Company shortcut

Ticker Search

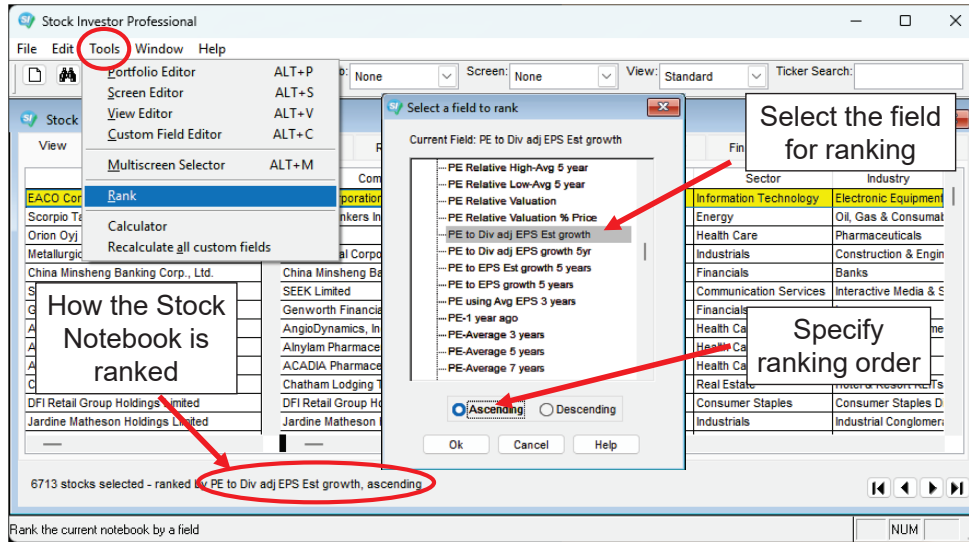
Company name	Ticker	Company Name	Industry
Costco Wholesale Corporation	COST	Costco Wholesale Corporation	Consumer Staples
Coty Inc.	COTY	Coty Inc.	Consumer Staples
Coursera, Inc.	COUR	Coursera, Inc.	Consumer Staples

6713 stocks selected - ranked by Company name, ascending

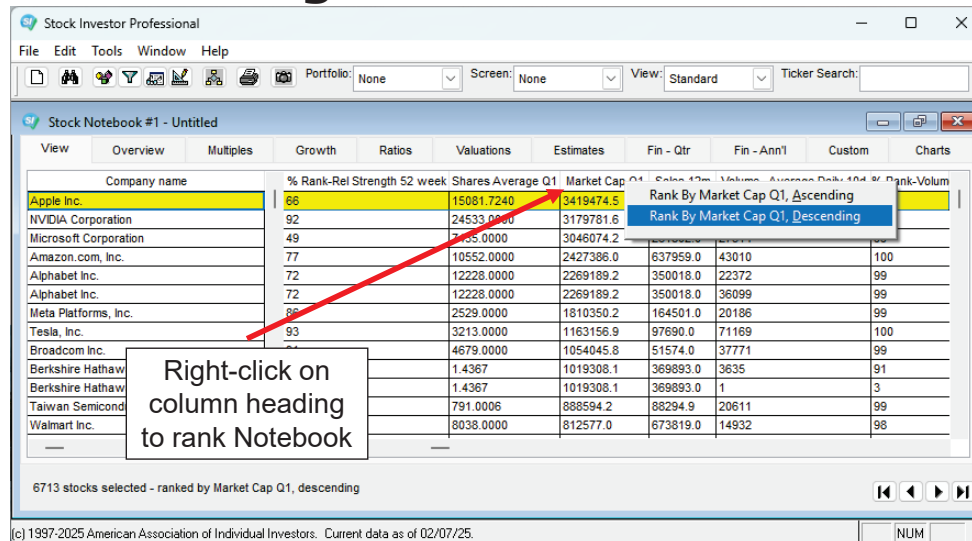
(c) 1997-2025 American Association of Individual Investors. Current data as of 02/07/25.

NUM

Ranking the Stock Notebook



Ranking the Stock Notebook



USING DATA VIEWS

Data Views

Stock Investor Professional

File Edit Tools Window Help

Portfolio: None Screen: None View: Standard Ticker Search:

Stock Notebook #1 - Untitled

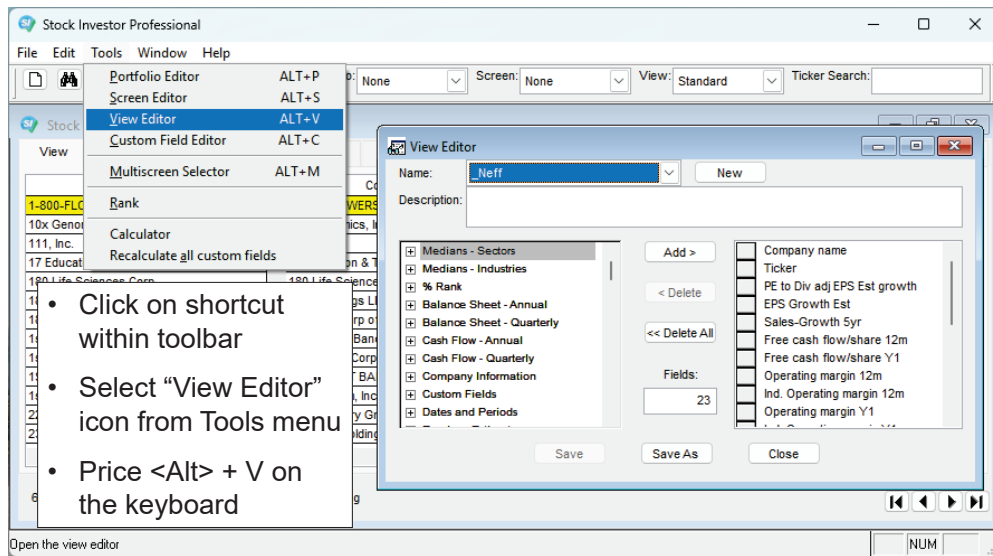
View Overview Multiples Growth Ratios Valuations Estimates Fin

Company name	% Rank-Rel Strength 52 week	Shares Average Q1	Market Cap Q1	S	% Rank-Volum
Apple Inc.	86	15081.7240	3419474.5	38	100
NVIDIA Corporation	92	24533.0000	3179781.6	113269.0	100
Microsoft Corporation	49	7435.0000	3046074.2	261802.0	27314
Amazon.com, Inc.	77	10552.0000	2427386.0	637959.0	43010
Alphabet Inc.	72	12228.0000	2269189.2	350018.0	22372
Alphabet Inc.	72	12228.0000	2269189.2	350018.0	36099
Meta Platforms, Inc.	86	2529.0000	1810350.2	164501.0	20186
Tesla, Inc.	93	3213.0000	1163156.9	97690.0	71169
Broadcom Inc.	91	4679.0000	1054045.8	51574.0	37771
Berkshire Hathaway Inc.	66	1.4367	1019308.1	369893.0	3635
Berkshire Hathaway Inc.	65	1.4367	1019308.1	369893.0	1
Taiwan Semiconductor Manufacturing Comp	89	791.0006	888594.2	88294.9	20611
Walmart Inc.	90	8038.0000	812577.0	673819.0	14932

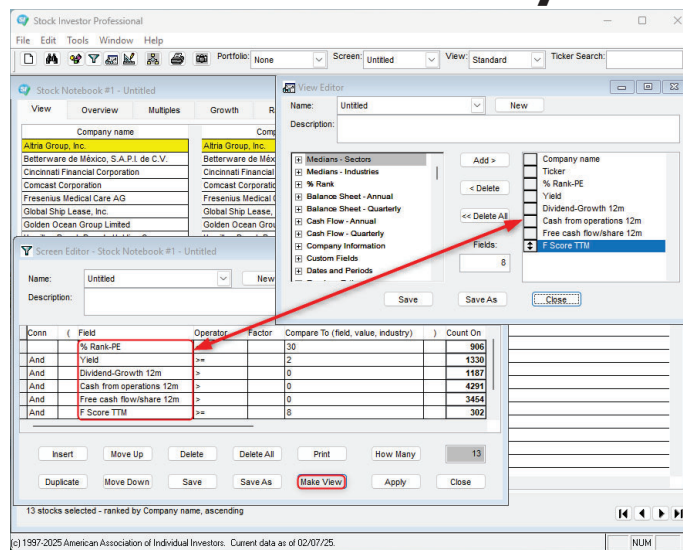
6713 stocks selected - ranked by Market Cap Q1, descending

(c) 1997-2025 American Association of Individual Investors. Current data as of 02/07/25.

View Editor

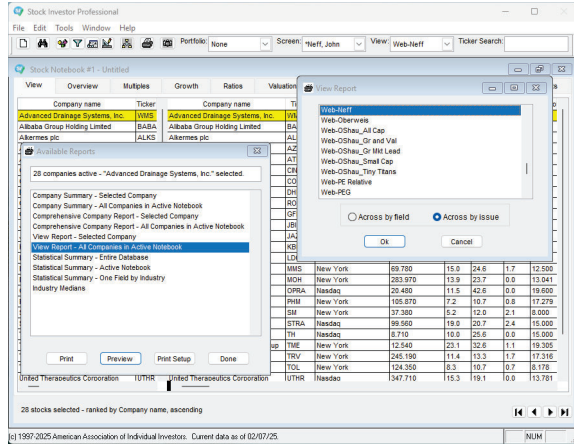


"View on the Fly"



Printing View Reports

- Print or preview data for active notebook using Views



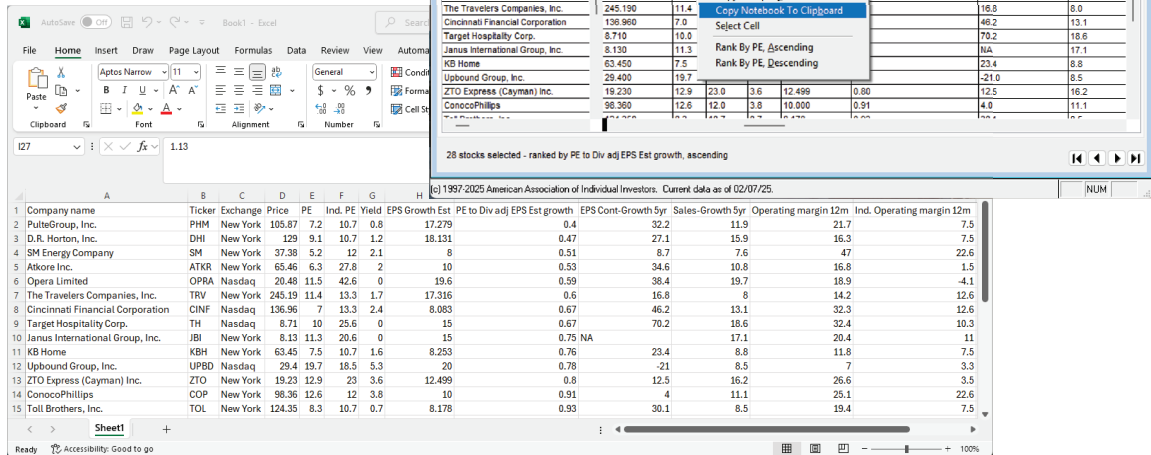
Stock Investor Report

Portfolio Name: None
Screen Name: None
Rank: None

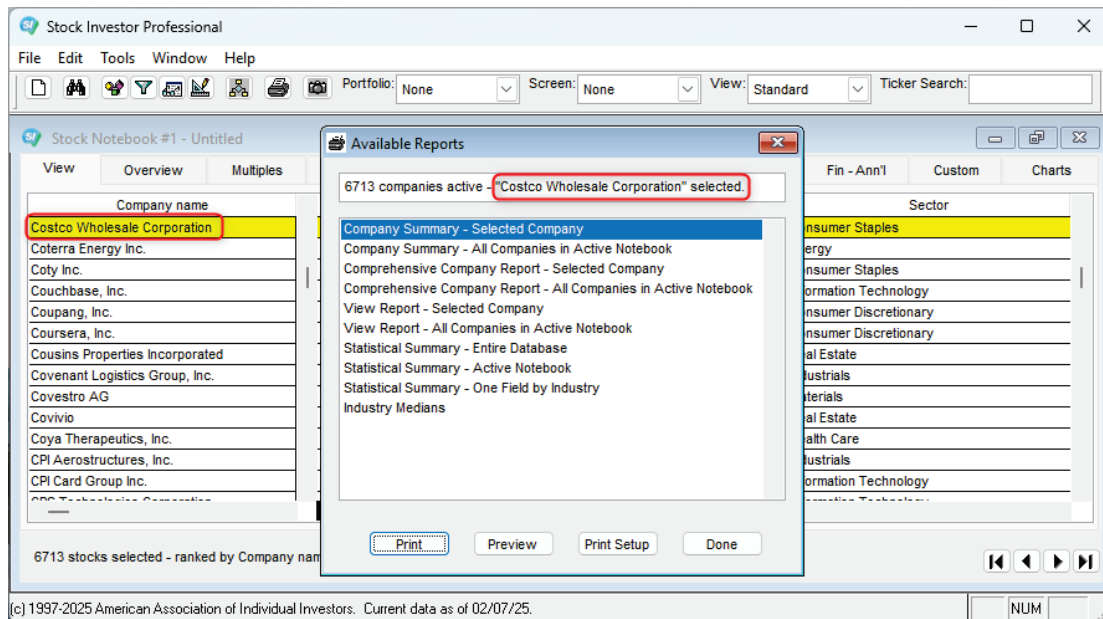
Web-Neff

	Advanced Drainage Systems, Inc.	Alibaba Group Holding Limited	Alkermes plc	AstraZeneca PLC	Aktion Inc.	Cincinnati Financial Corporation	ConocoPhillips
Ticker	WMS	BABA	ALKS	AZN	ATKR	CINF	COP
Exchange	New York	New York	Nasdaq	Nasdaq	New York	Nasdaq	New York
Price	120.43	101.51	11.97	11.33	61.48	136.98	36.38
PE	20.20	21.30	11.85	18.50	9.30	7.50	12.85
Ind PE	20.80	21.80	18.70	18.70	21.80	13.10	12.50
Yield	0.00	0.00	0.00	1.40	2.00	2.40	3.80
EPS 52Wk Est	17.50	18.81	12.28	12.54	10.30	17.90	10.50
PE to Div adj EPS Est growth	1.15	1.38	1.12	1.11	0.33	0.37	0.31
EPS 52Wk Growth Yr	38.60	12.90	40.50	14.40	14.40	42.30	4.00
Sales Growth Yr	15.70	18.30	7.70	17.30	10.30	13.10	11.10
Operating margin 12m	23.10	10.70	61.20	23.80	18.80	12.30	26.10
Ind Operating margin 12m	11.30	9.30	38.70	11.30	9.50	12.80	22.90
Web address	www.adpgrp.com	www.alibaba.com	www.alkermes.com	www.astrazeneca.com	www.aktion.com	www.cfin.com	www.conocophillips.com

Exporting Data Using Views



STOCK INVESTOR REPORTS



Company Summary Report

Costco Wholesale Corporation (Nasdaq: COST)				\$1043.80 (\$1063.00 \$697.20)			
CEO	W. Michael						
Chair	Committee						
Industry	Consumer Goods	Consumer Goods (Retail & Retail)					
Employees	500	500	500	4232	40172		
Revenue	446.1	446.1	446.1	16,827	16,827		
Profit	11.3	11.3	11.3	2,116	2,116		
EPS	1.33	1.33	1.33	2.11	2.11		
Dividend	0.00	0.00	0.00	0.00	0.00		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Frequency	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Date	01/14/2020	01/14/2020	01/14/2020	01/14/2020	01/14/2020		
Dividend Yield	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Payout Ratio	0.00%	0.00%	0.00%	0.00%	0.00%		
Dividend Growth	0.00%	0.00%	0.00%				

Comprehensive Company Report

Stock Investor Professional

File Edit Tools Window Help

Portfolio: None Screen: None View: Standard Ticker

Available Reports

6713 companies active - "Costco Wholesale Corporation" selected.

Company Summary - Selected Company
 Company Summary - All Companies in Active Notebook
Comprehensive Company Report - Selected Company
 Comprehensive Company Report - All Companies in Active Notebook
 View Report - Selected Company
 View Report - All Companies in Active Notebook
 Statistical Summary - Entire Database
 Statistical Summary - Active Notebook
 Statistical Summary - One Field by Industry
 Industry Medians

Comprehensive Company Report

Select sections of report to be printed

☒ Overview ☒ Description ☒ Share Statistics

☒ Multiples ☒ Growth Rates ☒ Ratios
☐ Valuations ☐ Earnings Estimates ☐ Custom Fields

☐ Financial - Quarterly
☐ Total ☒ Percent Change

☐ Financial - Annual
☐ Total ☐ Per Share ☒ Percent Change ☒ Common Size

Set All Ok Cancel

Print Preview Print Setup Done

Costco Wholesale Corporation (COST)

999 Lava Drive
 Issaquah, WA 98027
 Web: www.costco.com
 Phone: 425 313 8100
 Sector: Consumer Staples
 Industry: Consumer Staples Distribution & Retail

Exchange: Nasdaq
 Dow: None
 S & P: 500
 SIC: 5271
 Employees: 333,000

Optional: No
 ADR: No

Costco Wholesale Corporation, together with its subsidiaries, engages in the operation of membership warehouses in the United States, Puerto Rico, Canada, Mexico, Japan, the United Kingdom, Korea, Australia, Taiwan, China, Spain, France, Ireland, New Zealand, and Sweden. The company operates branded and private-label products in a range of merchandise categories. It offers merchandise, such as sundries, dry groceries, candies, coolers, freezers, dairy, liquor, and tobacco; appliances, electronics, health and beauty aids, hardware, lawn and garden, sporting goods, toys, and seasonal products; office supplies; automotive care products, postage, tickets, apparel, small appliances, furniture, domestics, housewares, special order kiosks, and jewelry; and meat, produce, service deli, and bakery products. The company also operates gasoline, pharmacies, optical, food courts, hearing-aid centers, and tire installation centers, and offers business delivery, travel, grocery, and various other services online. It also operates e-commerce websites. The company was formerly known as Costco Companies, Inc., and changed its name to Costco Wholesale Corporation in August 1999. Costco Wholesale Corporation was founded in 1976 and is based in Issaquah, Washington.

Share Information

Index	Rank	Activity	Purchases	Sales	% Owned	Number
Shares Out. (\$)	443,390	Institutions - Shares (K)	3,708	11,098	0.0	4,134
Float (M)	442.88	Insiders - Shares (K)	0	0	0.2	
Market Cap (\$M)	453,340.1	- Transactions	0	3		

Shares Per ADR: NA
 Split Date: 01/14/2000

Share Statistics

Relative Strength (S & P 500)		Price Change (%)	
	Rank		
Split Factor	2.00000	4 Week	7.6
Price (\$)	1043.810	13 Week	12.5
Price-52 week high (\$)	1053.000	26 Week	11.2
Price-52 week low (\$)	597.270	52 Week	20.7

Volume

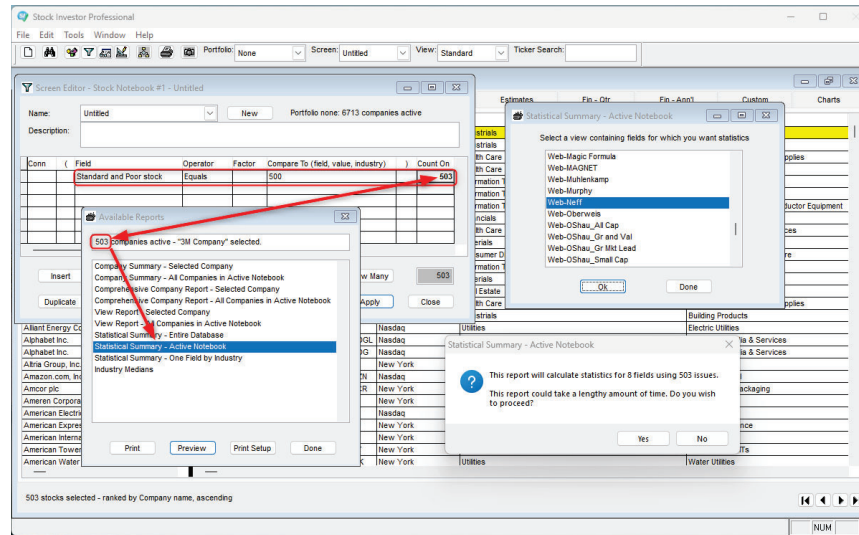
	Avg. Shares (K)	Rank
Daily	2,118	86
Monthly	42,581	84

NUM

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Statistical Summary Reports

Select set of companies
(entire database, screening results or portfolio)

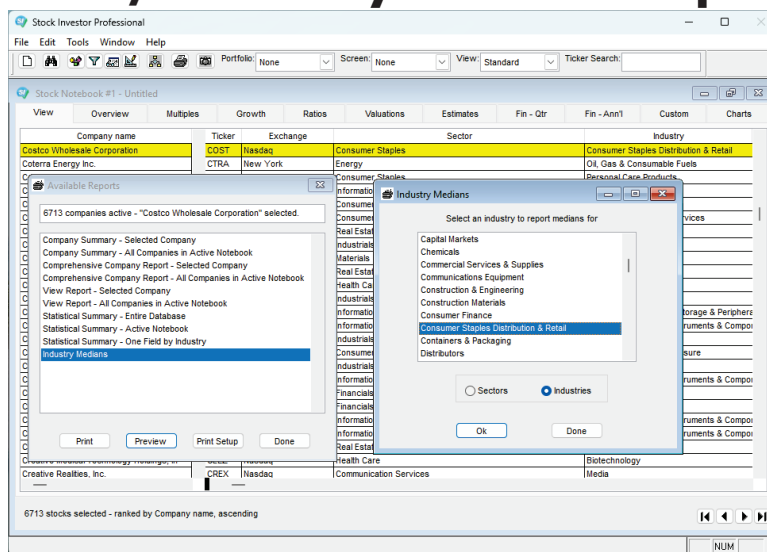


Select set of data points
for the report
with a View

Statistical Summary Report

Statistical Summary of Stock Investor Database						
Portfolio Name:		None				
Screen Name:		Untitled				
Field Name	Median	Average	Std. Dev.	High	Low	Sample
Price	124.37	223.44	466.73	7,658.05	9.24	503
PE	24.70	40.76	84.37	990.10	3.30	480
Yield	1.60	1.90	1.68	8.10	0.00	503
EPS Growth Est	9.34	10.74	11.44	175.00	-39.55	481
PE to Div adj EPS Est growth	2.32	4.70	12.03	145.03	0.18	454
EPS Cont-Growth 5yr	9.60	12.83	26.37	166.40	-74.80	497
Sales-Growth 5yr	6.40	8.16	9.39	119.30	-15.60	499
Operating margin 12m	19.10	20.57	13.50	96.10	-53.00	503

Sector/Industry Median Reports

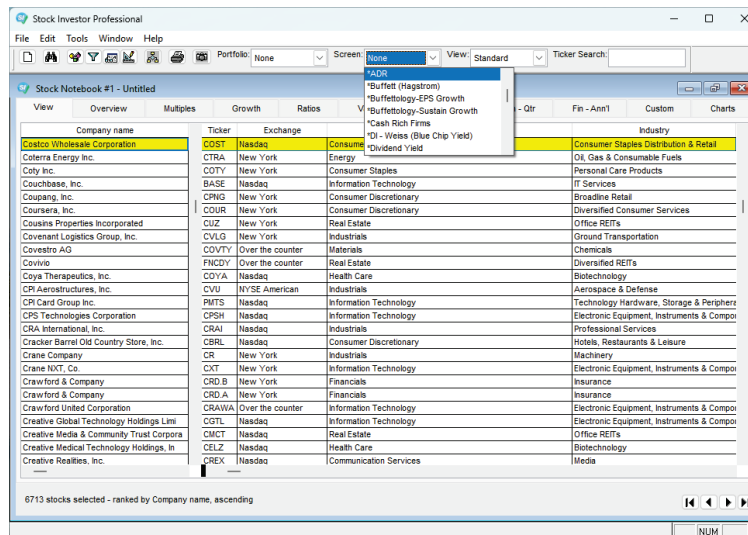


Industry Median Report

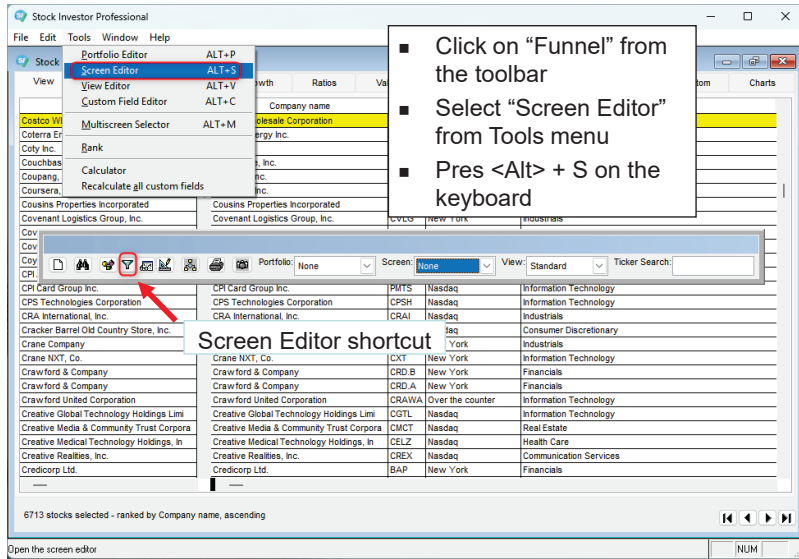
Stock Investor Industry Median Report									
Industry: Consumer Staples Distribution & Retail									
Multiples	Current	1 Year Ago	3 Year Avg.	5 Year Avg.	7 Year Avg.				P/E Ratios
Price/Earnings per Share	25.60	19.80	19.20	20.20	19.90	Est. Year 2			14.00
Price/Book Value per Share	2.32	2.24	2.56	2.38	2.58	Est. Year 1			15.90
Price/Sales per Share	0.40	0.40	0.50	0.60	0.60	Est. Current Year			18.80
Price/Cash Flow per Share	18.90	34.60	30.60	0.00	0.00	Year 1 Avg.			20.00
Price/Free Cash Flow per Share	24.40	39.20	37.20	31.60	37.40	Year 2 Avg.			20.60
Yield	0.00	0.00	0.00	0.00	0.30	Year 3 Avg.			19.00
P/E to Estimated Growth - 5 Years	2.50					Year 4 Avg.			19.40
P/E to Growth - 5 Years	1.80					Year 5 Avg.			24.00
P/E to Dividend Adjusted Growth - 5 Years	1.50					Year 6 Avg.			21.40
						Year 7 Avg.			17.80
Annual Growth Rates (%)	1 Year Trailing	1 Year	3 Year	5 Year	7 Year				
Sales	4.90	5.00	9.10	7.60	7.10				
Gross Income	6.00	6.60	7.90	6.50	8.10				
Net Income	10.20	5.20	6.70	7.60	8.10				
EP \$ (Total)	14.80	9.50	9.30	10.20	9.60				
EP \$ (Continuing)	9.80	9.50	10.40	10.10	10.30				
EP \$ (Diluted Continuing)	10.10	9.60	10.50	10.10	10.10				
Cash Flow per Share	-66.50	-35.60	-29.60	-6.50	-10.50				
Free Cash Flow per Share	77.00	30.40	-8.50	12.40	11.90				
Dividends per Share	1.50	0.00	0.00	0.00	0.00				
Earnings Estimates (EPS)	Current Month	Previous Month	High	Low					
Long-Term Growth	7.90	7.90	9.80	7.30					

RUNNING PRE-DEFINED & CUSTOM STOCK SCREENS

Screen Drop-Down Menu

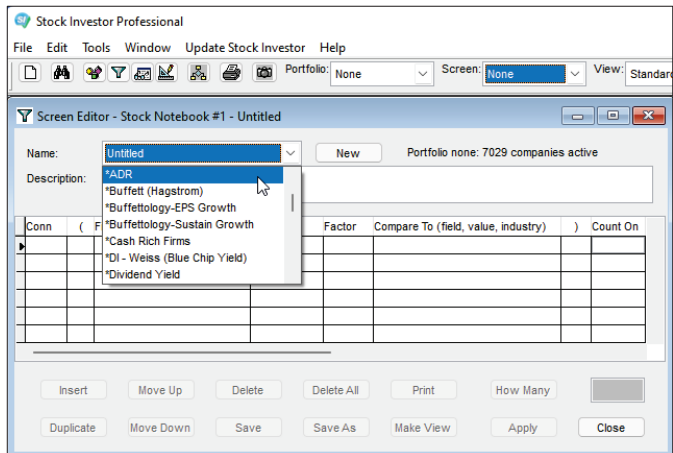


Activate Screen Editor

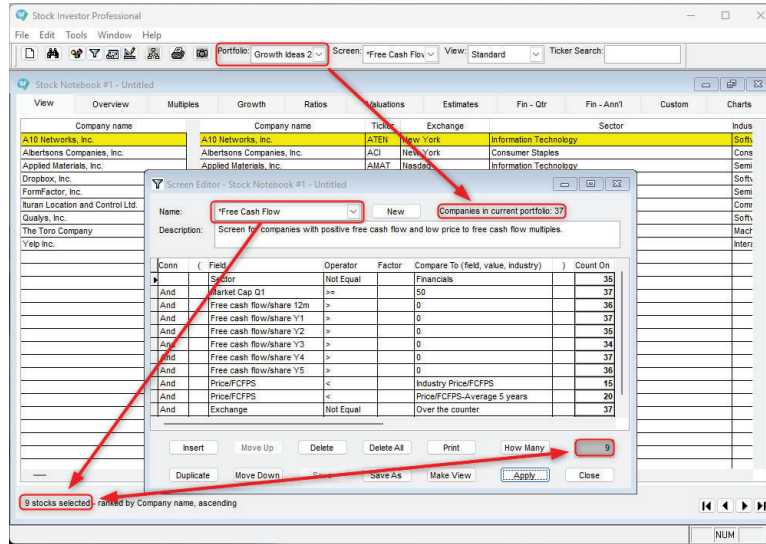


Modifying Saved Screens

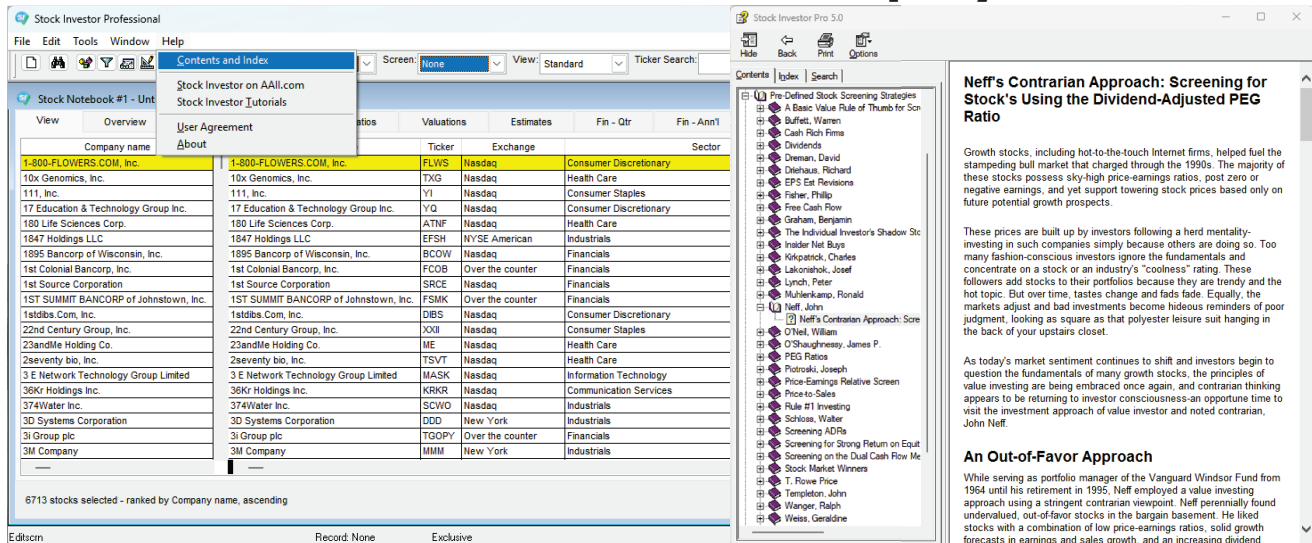
- Select from drop-down menu
- Over 60 preinstalled (predefined) screens are identified with an asterisk (*) in front of the name (brings them to the top of the list)



Run Screens Against Portfolios



Predefined Screens in Help System

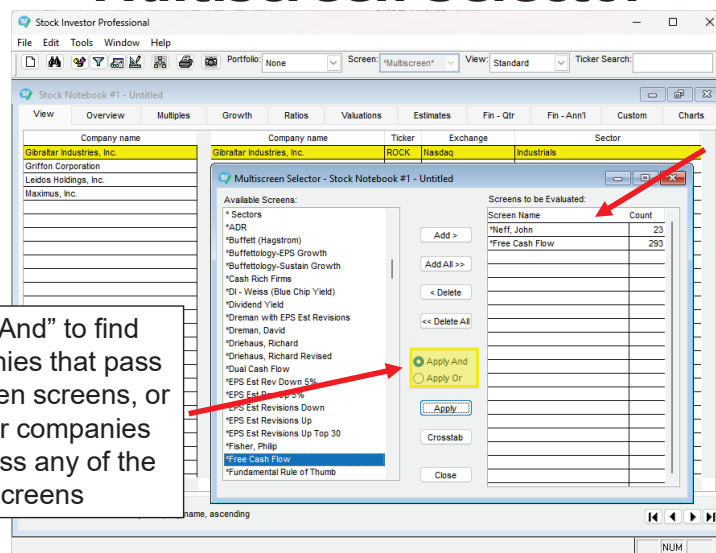


MULTISCREEN SELECTOR & CROSSTAB CALCULATOR

Multiscreen Selector

- Run multiple screens simultaneously to see if any companies pass multiple screens or get a listing of all stocks passing any of a collection of screens
- You can choose from any of the pre-defined screens as well as any custom screen you create
- Can opt to see if any companies pass all of the selected screens (Apply And) or see which companies pass any of the selected screens (Apply Or)

Multiscreen Selector



Choose any combination of predefined and custom screens

Use "And" to find companies that pass all chosen screens, or "Or" for companies that pass any of the screens

Crosstab Calculator

- The Crosstab Report shows stocks that pass a minimum number of selected stock screens.
- It also can show which companies are passing the most screens.

Crosstab Calculator

Choose any combination of predefined and custom screens

Available Screens:

- 1-800-FLOWERS.COM, Inc.
- 10x Genentech, Inc.
- 111, Inc.
- 17 Education & Technology
- 180 Life Sciences Corp.
- 1847 Holdings LLC
- 1895 Bancorp of Wisconsin
- 1st Colonial Bancorp, Inc.
- 1st Source Corporation
- 1ST SUMMIT BANCORP of J...
- 1stSource.com, Inc.
- 22nd Century Group, Inc.
- 23andMe Holding Co.
- 2earevity bio, Inc.
- 3 E Network Technology Gr...

Screens to be Evaluated:

Screen Name	Count
*ADR	25
*Buffett (Hagstrom)	34
*Buffettology-EPS Growth	45
*Buffettology-Sustain Growth	21
*Cash Rich Firms	26
*DI - Weiss (Blue Chip Yield)	1
*Dividend Yield	33

Lowest count of screens to be included in crosstab: 5

Select the minimum # of screens a stock must pass

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	Johnson Athlete Inc.	Smear International, Inc.	D.R. Harlan, Inc.	Deann Rr, Inc.	Enova International, Inc.	Madison Group Inc.
*ADR						
*Bofal (Bogalotti)	X		X			
*Bofalony & PS Growth						
*Bofalony & Salem Growth	X					
*Cash Rich Firm						
*Ch. Weiss (Bank Coll. Yield)						X
*Civense Yield			X			
*Graham w/ EPS Est. Revisions						X
*Graham, David						
*Graham, Richard						
*Graham, Richard Revised					X	
*Guth Cash Flow				X		
*EPS Rev Down 5%			X		X	
*EPS Rev Up 5%		X	X	X	X	
*EPS Rev Revisions Down						
*EPS Rev Revisions Up	X	X	X	X	X	X
*EPS Rev Revisions Up Top 30		X	X	X	X	X
*Fischer, Philip						
*Free Cash Flow						
*Fundamental Rule of Thumb						
*Graham (Defensive Investor)			X			
*Graham (Defensive Utility)						
*Graham (Enterprising) Revised			X			
*Graham, NC&V						
*HESP (Shadow Stock Screen)						
*Hedge Net Buy						
*Knaptrick, Bergen		X				
*Knaptrick Growth		X				
*Knaptrick Value						
*Knaptrick, Joseph						
*Lynch, Peter						
*Mullins, Ronald				X		
*Nail, John						
*O'Neil (CAN SLIM Revised)						
*O'Neil (CANSLIM)						
*O'Shaughnessy AI Cap						
*O'Shaughnessy Growth						
*O'Shaughnessy Growth II			X			
*O'Shaughnessy Small Cap						
*O'Shaughnessy Tiny Firms						
*O'Shaughnessy Value						
*PE Ratios w/ Est. Revisions	X	X			X	X
*PE Estimated Growth						
*PE Estimated Growth	X				X	
*Penson, Joseph B.						
*Penson: High V-Score						
*Price to Sales						
*RICE	X					
*Rus #1	X			X		
*Russ, Walter						
*Russ: Market Winners						
*T. Mueler Price						
*Templeton, John						
*Tenger, Keith						

Data courtesy of SP2 Global Market Intelligence

© 2004 SP2 Global Market Intelligence

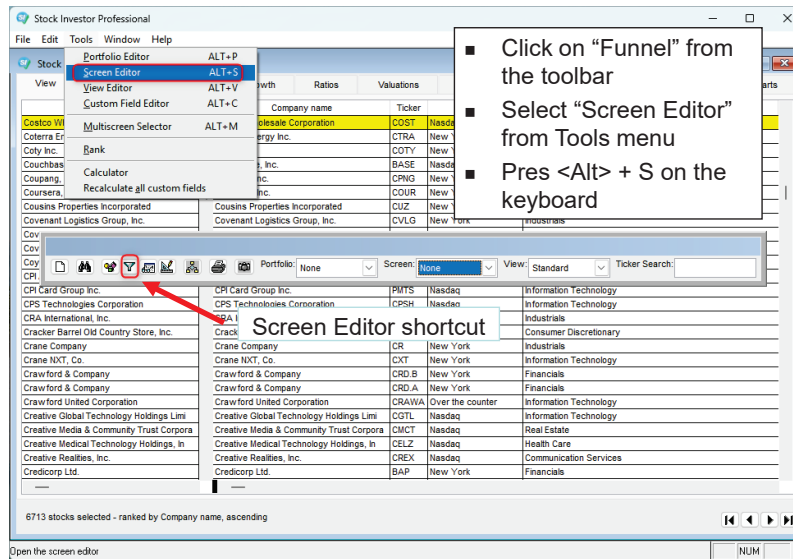
Monthly data as of 02/14/05. Weekly data as of 02/14/05.

http://www.sp2.com

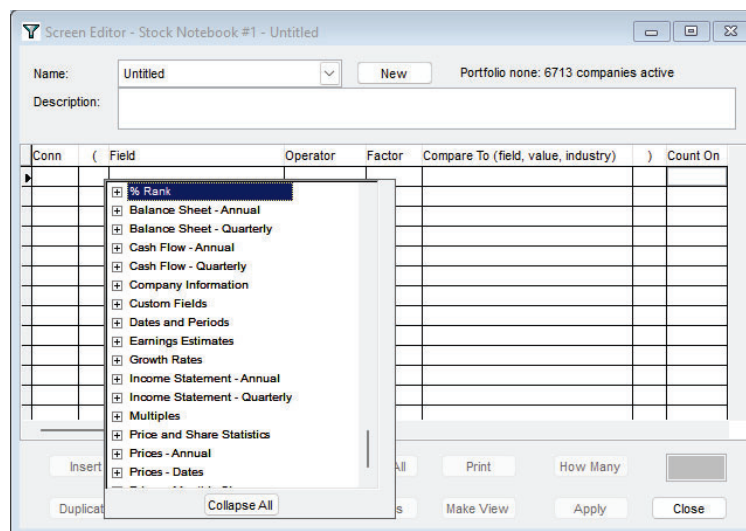
Page 1 of 2

BUILDING CUSTOM SCREENS

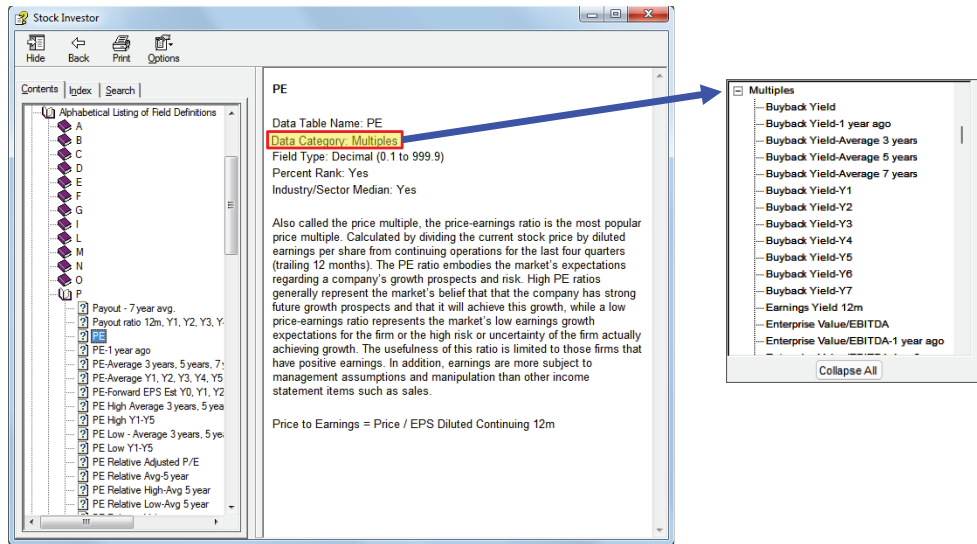
Activate Screen Editor



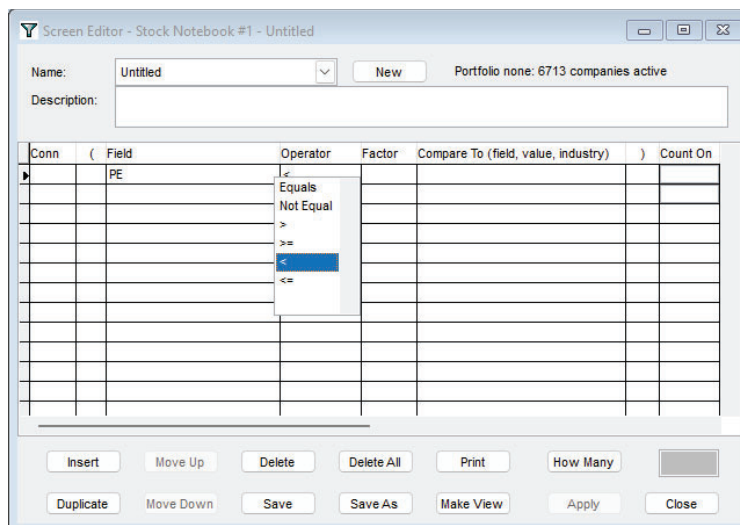
Select Items From Field Picker



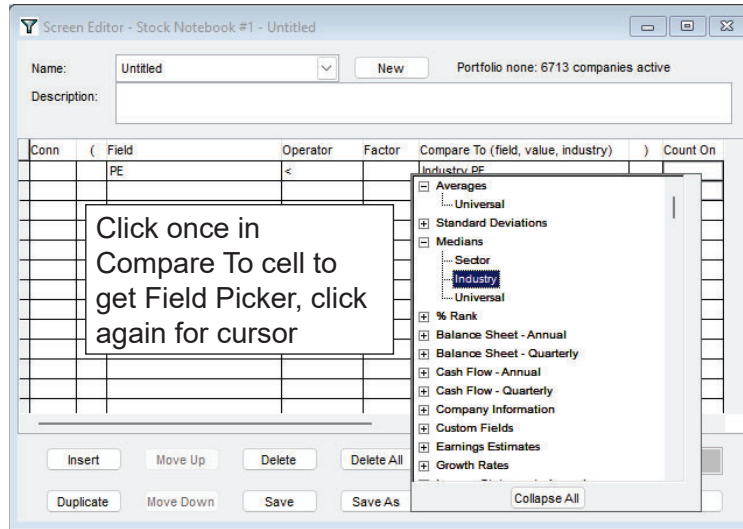
Field Definitions Provide Data Category



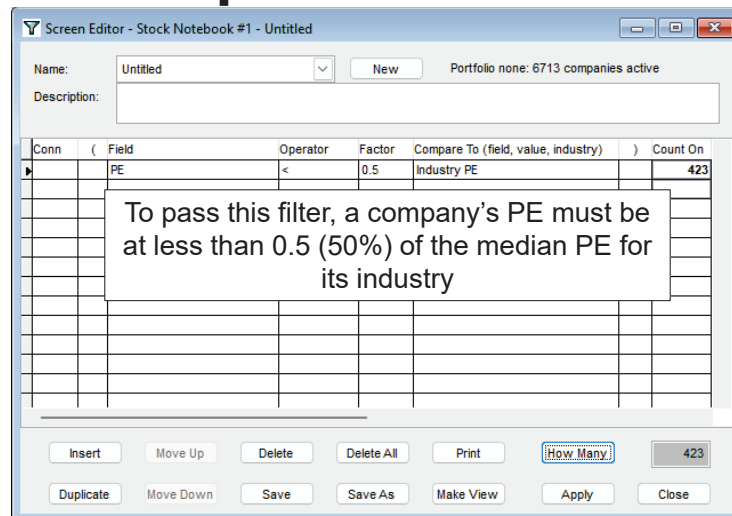
Operator Varies With Field Type



Compare to Field, Value, Norm



Factor Is a Multiplier for the "Compare To" Element



Link Criteria With And/or Connectors

Screen Editor - Stock Notebook #1 - Untitled

Name: Untitled New Portfolio none: 6713 companies active

Description:

Conn	(	Field	Operator	Factor	Compare To (field, value, industry)	)	Count On
		PE	<	0.5	Industry PE		423
And		EPS Growth Est	>=	7			1373

Duplicate Move Down Save Save As Make View Apply Close

The Screen Editor looks at all expressions before an “or” statement and performs a screen. The results of that sub-screen are then “set aside,” and the filtering continues, screening those expressions that contain the “or” statement and all those thereafter. If additional “or” statements are contained within the screen, it will perform additional sub-screens and set the results aside. When the entire screen has been performed, the Screen Editor then lumps together those companies that passed each of the sub-screens to arrive at the total number of passing companies.

Count On & How Many

Screen Editor - Stock Notebook #1 - Untitled

Name: Untitled active

Description:

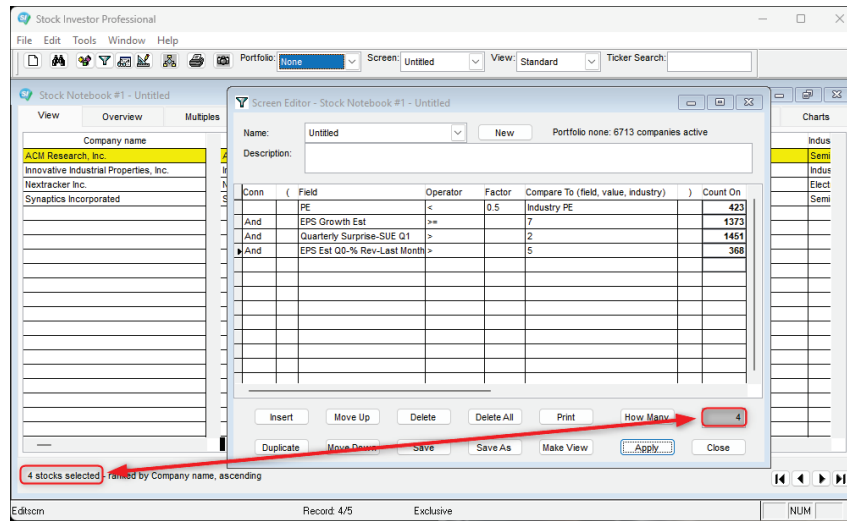
Conn	(	Field	Operator	Factor	Compare To (field, value, industry)	)	Count On
		PE	<	0.5	Industry PE		423
And		EPS Growth Est	>=	7			1373
And		Quarterly Surprise-SUE Q1	>	2			1451
And		EPS Est Q0-% Rev-Last Month	>	5			368

Insert Move Up Delete Delete All Print How Many 4 Duplicate Move Down Save Save As Make View Apply Close

Number of companies passing each individual line of criteria

Number of companies Passing the all filters

Apply Button Runs Screen & Loads Results into Active Notebook



STOCK NOTEBOOK AS AN ANALYSIS "TEMPLATE"

The Stock Notebook is a "Template"

- The active set of companies
 - The entire universe
 - A portfolio
 - The results of an applied screen
- A rank order
- A data view
- You can save Notebooks with different combinations
 - Specify a default Notebook

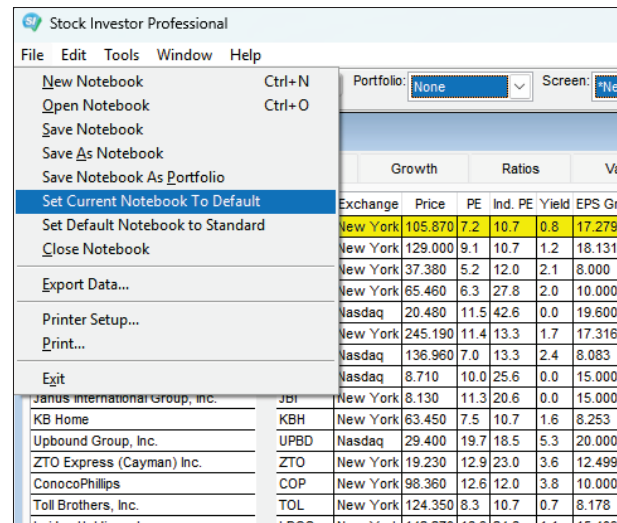
Stock Investor Professional

File Edit Tools Window Help

<

Setting a New Default Notebook

- The Default Notebook is what opens whenever you run Stock Investor Pro



USER RESOURCES

User Resources

Stock Investor
Pro Help
System

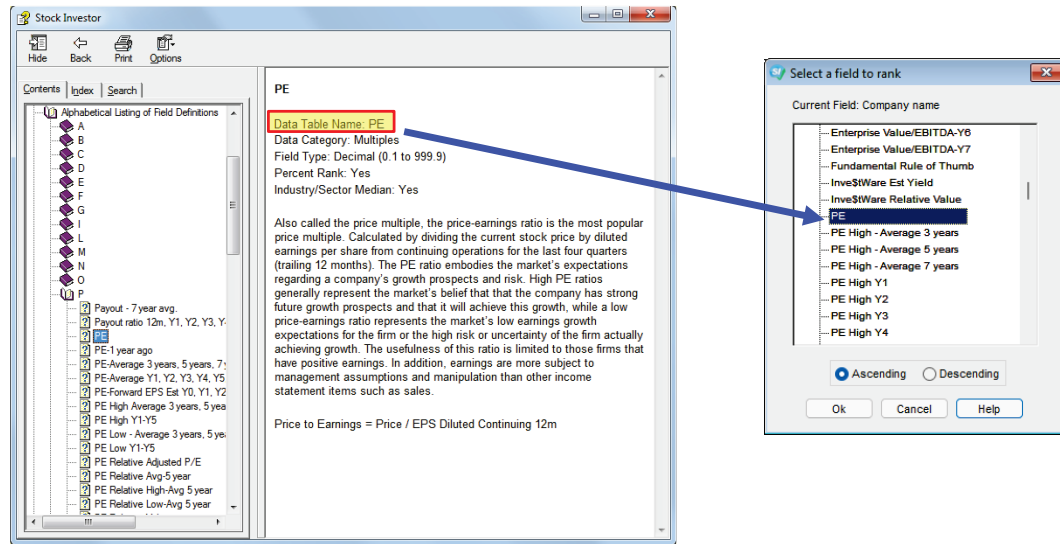
Stock Investor
Pro area of
AAII.com

Help System

The screenshot displays the 'Stock Investor Professional' software interface. The main window shows a list of companies with columns for Company name, Ticker, Exchange, and Industry. The 'Help System' window is open, showing the 'Contents and Index' tab. The 'Contents' list includes: 1. Using the Notebook to View Financial Data, 2. Creating and Using Screen Filters, 3. Creating and Using Portfolios, 4. Creating Your Own Data Fields, 5. Pre-Defined Stock Screening Strategies, 6. Printing/Export Data, 7. Stock Investor Utilities, 8. Field Definitions, 9. Industries, 10. Sectors, and 11. Automatic Updates. The 'Stock Investor Overview' window is also open, displaying a welcome message and a list of features:

- Screen NYSE, Amex, Nasdaq and over-the-counter (OTC) common stocks based on their financial information
- Display the output of the screening process on your monitor, print a custom report, or export to a spreadsheet or text file
- Access numerous pre-programmed stock screens and articles about screening and security analysis on-line

Help System: Field Definitions



www.aaii.com/stock-investor-pro

- Download the full program
 - Daily updates Tuesday through Saturday
- Archive of past updates (since 10/1/2024)
- Videos and how-to articles
- Troubleshooting guide
- FAQs

Stock Investor Pro | AAI

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Stock Investor

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Installing Stock Investor Pro

You can download the data and full Stock Investor Pro program by clicking the orange download button below. If you already have Stock Investor Pro installed and wish to make use of the automatic updates, please click [here](#) to learn how.

Attention AII Stock Investor Pro Users
As of October 1, 2024, we are using S&P Global Market Intelligence for fundamental stock data and earnings estimates. For more information, click [here](#).

Download Stock Investor Pro Program/Data (Data as of 02/10/2025)

[Past updates](#)

Getting Started

[Stock Investor Pro Getting Started Guide](#)

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[Measuring Performance With Relative Strength](#)

[Using the Stock Notebook to Improve Your Productivity With Stock Investor Pro](#)

[Stock Investor Pro Q&A Webinar](#)

Introduction to Stock Investor Pro

A Intro to Stock Investor Pro

AAII Contact & Help Page

Stock Investor Pro | AAI

aaai.com/stock-investor-pro/archives

Stock Investor Pro Data Archive

At the request of our former data vendor, LSEG, we removed Stock Investor Pro installations dated prior to October 1, 2024. Click on year or month to expand library of downloadable programs.

Right click on a link below, and select "Save Link As" when your browser prompts you.

2025

February

- [stockinvestorinstall_20250210.exe](#) - Full Program and Data Update, Data as of 02/10/2025
- [stockinvestorinstall_20250207.exe](#) - Full Program and Data Update, Data as of 02/07/2025
- [stockinvestorinstall_20250206.exe](#) - Full Program and Data Update, Data as of 02/06/2025
- [stockinvestorinstall_20250205.exe](#) - Full Program and Data Update, Data as of 02/05/2025
- [stockinvestorinstall_20250204.exe](#) - Full Program and Data Update, Data as of 02/04/2025
- [stockinvestorinstall_20250203.exe](#) - Full Program and Data Update, Data as of 02/03/2025

Stock Investor Pro | AAI

aaai.com/stock-investor-pro/videotutorials

Measuring Performance With Relative Strength

AAII's fundamental stock screening and research database allows users to measure stock performance and screen for outperforming stocks using relative strength.

A Isolating Data Fields

name	Company name	Ticker	ISIN	Price/Basis	Yield	EPS	Cost-Growth Yr	EPS Growth Est	Market Cap (\$)
Apple Inc.	Apple Computer Inc.	APPL	US121810AA	140	0.00	14.55	14.55	14.55	1660.00
Costco	Costco Wholesale Corp.	COST	US121810AA	12.8	0.45	0.9	0.9	0.9	250.0
Ther	Therapeutics, Inc.	THRX	US121810AA	12.8	0.45	0.9	0.9	0.9	13.333

Watch on YouTube

Stock Investor Pro | AAI

aaai.com/stock-investor-pro/sinewsarchive

Stock Investor Pro News Archive

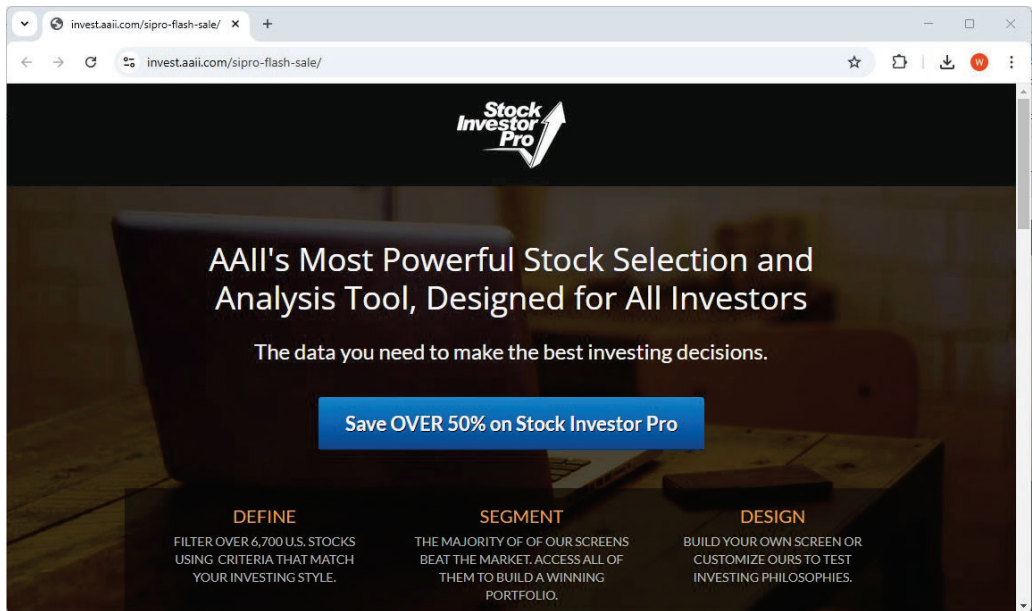
STOCK INVESTOR NEWS—PAST ISSUES

- December 2017** > Creating Reports in Stock Investor Pro
- November 2017** > Troubleshooting Resources for Stock Investor Pro
- October 2017** > Getting a Helping Hand: The Stock Investor Help System
- September 2017** > Exploring the Notebook Tabs
- August 2017** > Using the Screen Editor
- July 2017** > An Overview of the Screen Editor
- June 2017** > Common Size Financial Statement Analysis

FINAL THOUGHTS

Special Offer for Today's Attendees:

\$147 1-year subscription (58% off regular price of \$349/yr.)



The screenshot shows a web browser window with the URL invest.aaii.com/sipro-flash-sale/. The page features the "Stock Investor Pro" logo at the top. The main headline reads "AAII's Most Powerful Stock Selection and Analysis Tool, Designed for All Investors". Below this, a sub-headline states "The data you need to make the best investing decisions." A prominent blue button in the center says "Save OVER 50% on Stock Investor Pro". At the bottom, there are three columns of text: "DEFINE" (FILTER OVER 6,700 U.S. STOCKS USING CRITERIA THAT MATCH YOUR INVESTING STYLE), "SEGMENT" (THE MAJORITY OF OF OUR SCREENS BEAT THE MARKET. ACCESS ALL OF THEM TO BUILD A WINNING PORTFOLIO.), and "DESIGN" (BUILD YOUR OWN SCREEN OR CUSTOMIZE OURS TO TEST INVESTING PHILOSOPHIES).

Thank You!

techsupport@aaii.com or wayne@aaii.com