

COMPARISON: THE TOP WEB-BASED STOCK SCREENING SERVICES

Screening Service			Morningstar.com Premium Stock Screener	SmartMoney.com Select Stock Screener	StockScreen123.com	Zacks.com Free Custom Stock Screener
Company			Morningstar, Inc.	SmartMoney.com	StockScreen123.com	Zacks Investment Research
Web Address			www.morningstar.com	www.smartmoney.com	www.stockscreen123.com	www.zacks.com
Screening Service			\$21.95/mo. or \$189/yr. (free 14-day trial)	\$5.95/mo. or \$58/yr. (free 14-day trial)	\$395/yr. (free 30-day trial)	free
Fundamental Data Source			Morningstar, S&P	FactSet, SIX Telekurs	Thomson Reuters	Zacks Investment Research
Database Content	Number of Stocks/Data Fields		10,000+ stocks/1,800+ fields	8,400+ stocks/1,400+ fields	8,200+ stocks/2,000+ fields	7,600+ stocks/900+ data fields
	Company Information	Company Web Link	✓	✓	✓	✓
		DRP Plan	✓	✓		
		Industry/Sector Grouping (Source)	✓ (Morningstar, SIC, NAICS, ISIC)	✓ (Dow Jones)	✓ (Thomson Reuters)	✓ (Zacks)
		Description Length	50 words	30 words	150 words	30 words
	Estimates—Earnings (EPS) & Revenues	Source	Morningstar, Inc.	FactSet	Thomson Reuters	Zacks
		Quarterly		✓ (EPS 2 qtrs)	✓ (EPS 2 qtrs)	✓ (EPS 4 qtrs; revenues 1 qtr)
		Annual	✓ (EPS 2 yrs)	✓ (EPS 2 yrs)	✓ (EPS 2 yrs)	✓ (EPS 2 yrs; revenues 1 yr)
		Growth—Long Term	✓ (EPS)	✓ (EPS)	✓	✓ (EPS)
		Surprise		✓ (EPS 5 qtrs)	✓ (EPS 5 qtrs)	✓ (EPS 2 qtrs, avg last 4 qtrs)
	Revisions/Trend	✓ (trend over last 90 days)	✓ (trend over last 90 days)	✓ (trend last 13 wks; changes last 4 wks)	✓ (EPS revisions/trend over last 90 days)	
	Consensus Analyst Recommendations		✓	✓	✓	
	Consensus Analyst Rec—Changes/Trend		✓ (trend over last mo)	✓ (changes/trend over last 3 mos)	✓ (EPS: 2)	✓ (changes/trend over last 4 wks)
	Valuation/Rating (Source)	Fundamental	✓ (Morningstar Grades & Fair Value)			
		Technical	✓ (Morningstar)			
	Ratios (Benchmarks)	Risk	✓ (Morningstar)			
		Leverage	assets/equity, debt/equity (S&P 500); It debt/assets, debt/assets, liabilities/assets	It debt/equity, debt/equity, It debt/capital, interest coverage	It debt/equity, debt/equity (historical, industry)	debt/equity (industry, S&P 500); debt/capital
		Liquidity	current (S&P 500); quick, payout	current, quick, payout	current, payout, interest coverage (historical, industry, sector, market)	current, quick, cash, payout
		Profitability*	ROA, ROE, ROI, GM, OM, NM (industry, S&P 500)	ROA, ROE, ROI, GM, OM, PM	GM, OM, NM, ROA, ROE, ROI (historical, industry, sector, market)	ROA, ROE, ROI, NM (industry, S&P 500); OM
		Multiples*	P/E, P/B, P/S, P/CF, PEG, yield (industry, S&P 500)	P/E trailing & fwd, P/B, P/S, P/CF, P/FCF, PEG, yield (industry)	P/E trailing, P/S, P/CF, P/FCF, P/B, PEG, yield (industry, sector, market)	P/E fwd & trailing, P/B, P/S, P/CF (industry, S&P 500); PEG, yield
	Turnover	fixed asset, inventory (indus, S&P 500); total asset, receivables	total asset, inventory	receivables, asset (historical, indus, sector, market)	total asset, inventory, receivables	
	Historical Growth Rates	Elements	sales, oper inc, net inc, EPS, oper CF, FCF, BVPS, dividends	sales, EPS, dividends, R&D	sales, net inc, oper inc, EPS, dividends, cash flow, capex, FCF, assets, cash per share, BVPS, oper cash	sales, EPS
		Periods (Benchmarks)	4 qtrs YoY; 10 yrs YoY; 1-, 3-, 5-, 10-yr (industry, S&P 500)	qtr YoY, QoQ, 1-yr, 3-yr, 5-yr (sector, industry, index)	YoY sales, oper inc, net inc, assets, oper cash; QoQ sales, EPS; (indus, sector, mkt); 5-yr sales, EPS, divs	1-yr, 5-yr (S&P 500, industry); qtr, 12-mo
		Total/Annualized	✓ (total, annualized)	✓ (annualized)	✓ (annualized)	✓ (annualized)
	Price & Share Data	High/Low/Close/Volume	✓ (1 mo, 52-wk & 5-yr high/low), % 52-wk high	✓ (52-wk high/low, high/low/close/vol)	✓ (52-wk high/low)	✓ (52-wk high/low, high/low/close/vol)
		Returns	✓ (trail 1 dy, 1wk, 3 mo, YTD, 1-, 3-, 5-, 10- & 15-yr total rets on dy, mo & qtrly basis; ann'l rets last 5 yrs)	✓ (YTD, 52-wk, 3 & 5 yrs)	✓ (1-, 4-, 12-, 26-, & 52-wk)	✓ (% change YTD, 4-, 12-, 52-wk)
		Average Volume	✓	✓ (avg daily over last 3 mos)	✓ (10-day, 3-mo)	✓ (20-day)
		Relative Strength (Benchmarks)	✓ (industry, S&P 500)	✓ (3 mo)	✓ (52-wk) (S&P 500)	✓ (S&P: 4-wk, 12-wk, YTD)
		MPT Stats	✓ (beta)	✓ (beta)	✓ (beta, Sharpe ratio)	✓ (beta)
		Short Interest		✓ (ratio, % float, change)	✓ (% , shares, ratio)	✓ (ratio)
Market Cap/Float/Employees		✓ (market cap/employees)	✓ (market cap/float/employees)	✓ (market cap/float)	✓ (market cap)	
Insider Holdings	✓ (number)	✓ (number, %)	✓ (%)	✓ (%)		
Insider Trading	✓ (transactions)	✓ (shares bought/sold, # trans, \$ val)	✓ (shares bought & sold, net purchases)	✓ (transactions, net shares, # buy/sell trans)		
Institutional Holdings	✓ (% , \$ holdings, # funds owning)	✓ (%)	✓ (%)	✓ (%)		
Institutional Trading	✓ (share & change, transactions)	✓ (shares bought/sold over last 90 days)	✓ (shares bought & sold, net purchases)			
SEC Filings	✓	✓	✓			
Fundamental Screening	Number of Data Fields for Screening		450+	120	500	125+
	Create Custom Data Fields			✓	✓	
	Against Constant Values		✓	✓	✓	✓
	Against Other Data Fields		✓	✓	✓	
Viewing	Against Benchmarks (Industry/Sector, Index, etc.)		✓ (sector, index)	✓ (sector, industry, index)	✓ (industry)	
	Number of Data Fields for Sorting		440+	140+	500	124+
	Save Custom Screens		✓	✓	✓	
	Number of Predefined Screens		9	24	47	5
Reports	Browse Table		✓	✓ (up to 300 companies)	✓	✓
	Financial Statement Presentation		total \$, per share, % change, common size	total \$, per share	total \$, % change, common size	total \$
	Individual Company Summaries		✓	✓	✓	✓
	Charts/Graphs		✓	✓	✓	✓
Export Screening Results to a File			✓ (Excel, text)	✓ (Excel)	✓	
Formatted for Printing			analyst & company reports	custom SnapShot, financial statements	✓	
Statistical Summaries			✓ (screening results)	distribution histograms of screening results		