



The Stock Comparison Guide

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This session is being recorded for future use.

Notes about this PPT

The slides in this PPT are intended as documentation to help you review the tools or the webinar later

We won't spend a lot of time on slides now. We'll spend time online instead

There is a companion document for this PPT called "Stock Comparison Guide Views & Tool Differences"

This is not an stock study class. But if you need a refresher as you do a comparison guide later, the archived webinars (Slide 14) are all excellent

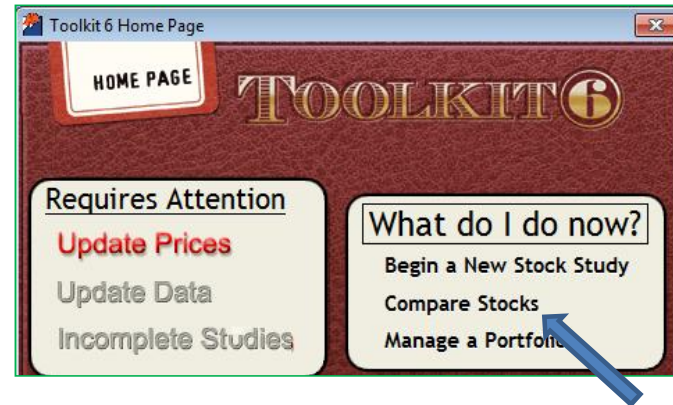
BI SCG software is built into BI SSG software

Online SCG for
Core and Plus SSG



Log onto BI, then click on
“Compare Stocks”

Toolkit 6 SCG



Open your desktop icon for TK,
then click on “Compare Stocks”

Use the SCG

- Compare up to 5 stock studies (SSGs) at one time
Compare quality, value and potential returns as calculated by your judgments.
- Compare the historical data of up to 5 companies
Before you complete stock studies
(CORE/PLUS only)
- Facilitate industry studies by clubs or several individuals working together



1st Step: Refresh **SSG** Data/Check Judgments

Before you start an SCG:

1. Refresh stock prices & quarterly data in each stock study you plan to compare
2. Make sure all judgment items are complete

The online tools (CORE & PLUS) will let you load SSGs that have only history data (no judgments)

Toolkit will not. You must complete judgments for all TK SSGs you plan to compare

SCG Data

10-year/5-year history data:

All downloaded data is from Morningstar

Judgments used in this presentation:

- * Sales growth = ACE estimates
- * Earnings growth = Preferred Procedure defaults
- * High/Low PEs = Average high and low
- * Yield = default average
- * Two tweaks: deleted 2014 EPS for PYPL
and 2008 EPS for MA

Always do your own research and use YOUR judgments

Number of data items in the 3 SCG tools

	Core SCG	Plus SCG	Toolkit 6
Growth Comparisons	6	8	4
Management Comparisons	3	3	3
Valuation Comparisons	6	16	16
Potential Return Comparisons	3	4	*
Other Comparisons	7	11	7
Total	25	42	30

* Potential Return and Other are combined in Toolkit.
TK has 4 sections, not 5.

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Agenda

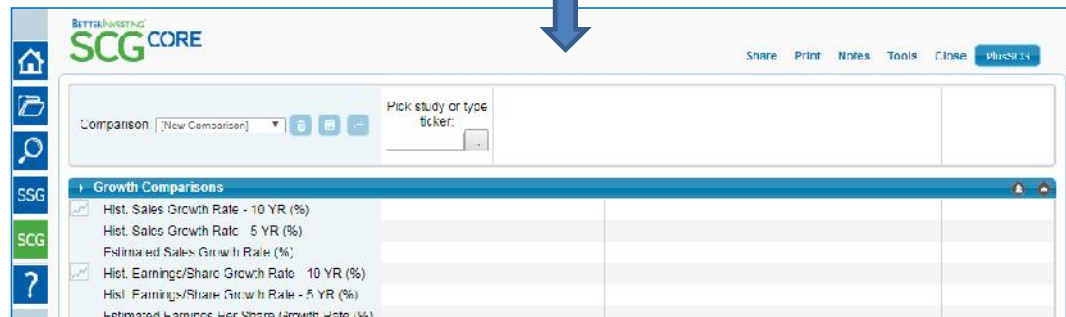
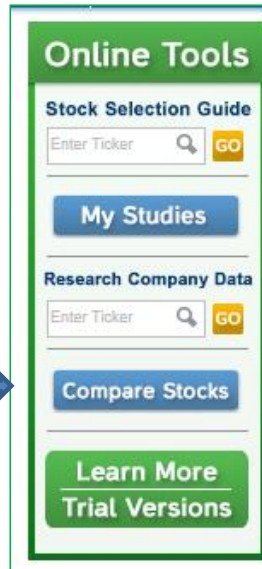
- ✓ Demonstrate the basic mechanics of the online SCG
- ✓ Demonstrate the basic mechanics of the desktop TK 6 SCG
- ✓ Answer questions

Steps to get to the CORE comparison guide
We will start at step 2

1. Log onto BI

2. Start the CORE/PLUS SCG here by clicking Compare Stocks

3. That click brings up the default CORE view of the Stock Comparison Guide, ready to be loaded with historical data or your completed SSGs for up to 5 companies



Note: whenever you are in the SSG, you can switch to the SCG by clicking on the SCG button in the vertical menu



Basic Mechanics Checklist Core and Plus

- Find the SCG on the BI website
The CoreSCG is the default view
- Add/delete/refresh companies in the comparison
- Name/save comparisons
- Collapse the view
- Add an industry comparison
- Review default highlighting/scores or set your own with Tools
Data in your SCGs will be familiar because they come directly from your stock studies
- Add notes to a comparison, print or share a comparison
*These operations will be familiar
They are the same as for SSGs*

Reminder: If you have a CORE subscription, you cannot access PLUS. If you have PLUS, you can access CORE too

Steps to get to the TK 6 SCG
We will start at step 2

1. Click on your desktop TK icon



2. Click on Compare Stocks



3. An intermediate screen will appear for loading up to 5 of your completed SSGs in the comparison guide

4. When you've added all your SSGs, there's a compare button to click to bring up the fully loaded comparison guide



Note: You can also bring up the SCG using the File tab in the top banner menu bar in step 2

Basic Mechanics Checklist for TK 6

- Find the SCG on your desktop icon
- Chose your library file to work with if you have several libraries
- Add/remove companies in the comparison
- Review automated highlighting or turn it off
Data in your SCGs will be familiar because they come directly from your stock studies
- Add optional weighting to data items using “criteria” button
- Display alternate data in rows 23, 27, 28 using “criteria” button
- Print the comparison

[Let's go online](#)

Excellent webinars in BI archives

In your online SSG/SCG vertical menu under “?” and on YouTube

Basic Usage of the Stock Comparison Guide (Tutorial) - April 13, 2016

<http://www.betterinvesting.org/tutorialscg>

https://www.youtube.com/results?search_query=better+investing+stock+comparison+guide

In StockUp Archives

Select the Best Using the SCG – April 6, 2016

Buy the Best: An Industry Study – June 1, 2016

Special Retail Industry Study – February 7, 2018

In your “My Classes” section of the BI Website Education Tab

Select the Best Using the Stock Comparison Guide

QUESTIONS

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2019 Calendar Items

Watch for email announcements about:

The Sacramento Area Chapter's
Breakfast with the Champions
in February

The next NORCAL webinar on the
Online SSG screening tools
in late January/early February



Exit Survey

When the webinar ends...

You will receive an exit survey asking for feedback about the webinar and what investing topics would you like us to present in the future

Possible topics:

1. Education for clubs/individuals
2. Mutual funds/ETFs
3. Annual reports
4. "Preferred procedure"
5. Investing behavior research
6. Value Line
7. Morningstar
8. Other topics

Thank you for coming!

Contact tonight's presenters:

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We value your feedback!