



The Stock Comparison Guide

Presented by


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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

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BI SCG software is built into BI SSG software


Online SCG for Core and Plus SSG

Toolkit 6 SCG




The screenshot shows a web interface titled "Online Tools". It includes a "Stock Selection Guide" search bar, a "My Studies" button, a "Research Company Data" section with a "Enter Ticker" search bar, a "Compare Stocks" button, and a "Learn More Trial Versions" button. A blue arrow points to the "Compare Stocks" button.

Log onto BI, then click on "Compare Stocks"




The screenshot shows a desktop application window titled "Toolkit 6 Home Page". It features a "HOME PAGE" header and a "TOOLKIT 6" logo. There are two main sections: "Requires Attention" with links for "Update Prices", "Update Data", and "Incomplete Studies"; and "What do I do now?" with links for "Begin a New Stock Study", "Compare Stocks", and "Manage a Portfolio". A blue arrow points to the "Compare Stocks" link.

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

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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

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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

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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

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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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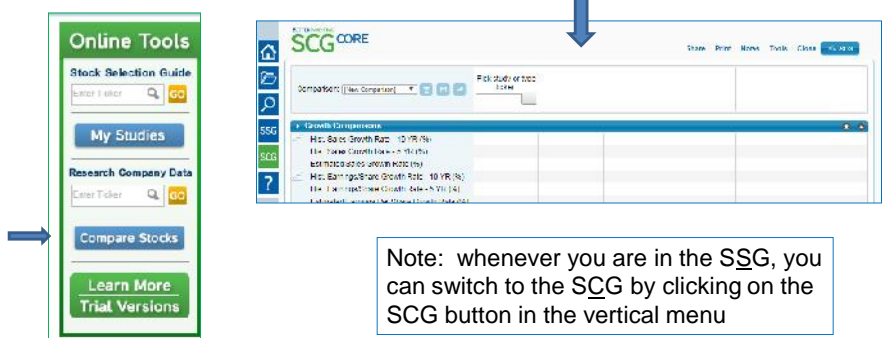
Agenda

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

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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

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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

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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

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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](#)

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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

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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

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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

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Thank you for coming!

Contact tonight's presenters:
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We value your feedback!