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	Persent Quart Models Data Even			· ourseasy · rate	1 8 CV815 1 1005 1	+ hoggie					Ze
Symbol	* Name	1	52 Week Close Range :								
GX.	Utd States (st	\$10.08	States Cost name -	Price 1 \$10.48	Change :	%Chg =	Vulume :	Dividend Yield :	Next EPS Report Date 3	Zacks Rank	
aw	Wayfair Inc	51.0	#21.67		\$0.02	0.19%	6,342,043	1.91%	1/29/20		
TSLA	Testa inc	NAME	8107.00	\$105.92	-93.46	-0.43%	694,740	0.00%	2/28/20	8	
B K	Kalogg Co	842.00	E-0.14	\$504.58	-58.50	-1.74%	8,383,909	0.00%	1/29/20	2	
CH	Hyatt Hotela Cp	607.05	\$10.76	\$72.90	\$0.16	0.23%	574,889	3.22%	3/06/20		
AM2N	Amazon Com Inc	\$1,586,22	R.02.29	\$87.91	\$0.54	0.39%	106,774	0.0075	2/12/20	1	
ANPL	Apple Inc	FS.7	674.86	\$1,065.31	-\$12.63	-0.87%	1,935,537	0.00%	1/96/20		
			SU-5.06	\$315.06	\$0.62	0.20%	18,867,734	0.89%	1/28/20		
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## zacks AdvisorTools

# Quick Start Guide 2021



advisortools.zacks.com



advisortools@zacks.com

(888) 691-0681

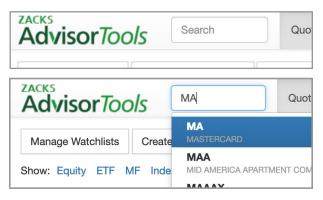
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### **Getting Started**

### Search for Equities, Mutual Funds and ETF data

Access the detailed Equity and Fund views by entering a known ticker symbol in the **Search** area, or start typing a ticker or name and have Intellisense provide a list of matching options.



### View information about current holdings, indices and economic series

Utilize the Quote Monitor feature to view daily performance data and additional tabs that provide quick access to vital asset-specific information such as research, news and events.

My Equity W	atchlist Equity						Updated	1 10:05 C	Options •
Overview	Zacks Research	Quar	nt Models	Data Ev	vents N	lews			
Symbol 🗘	Name	*	52 Week O	Close Range ≑	Price \$	Change \$	%Chg 🗘	Zacks Rank	\$
AAPL	Apple Inc		\$90.52	\$156.10	\$150.88	-\$4.59	-2.95%	3	×
XOM	Exxon Mobil Crp		\$80.49	\$95.12	\$82.22	-\$0.33	-0.40%	3	×
INT I	Inhone O Inhon		\$110.99	\$128.96	\$107.10	00.04	0 50%		

### Start idea generation with Zacks Research from the Advisor Tools main menu

#### Stock, ETF and Mutual Fund Idea views include:

- » Bull & Bear stocks of the day
- » Market analysis & outlook
- » Stock picking strategies & commentary

olio Monitor	Zacks Research - Market Stra	ategy - Chart
Restore Defa	Equity Ideas	
Restore Dela	Equity Select Lists	•
	Equity Model Portfolios	•
	Equity Research Coverage	
	ETF Ideas	
	ETF Model Portfolios	
	ETF Research Coverage	
÷	Mutual Fund Ideas	Change
	Mutual Fund Research Coverage	Change
\$95.69	Research History	\$2.
\$117.87	\$264.42 \$262.	69 \$1.

#### Equity, ETF and Mutual Fund Research

- » Multiple report types are available including Detailed Analysts, Quantitative Snapshot & Digest.
- » Click on the individual icons for **Report** and **Snapshot** to see reports.
- » Filter views by clicking on any of the listed item titles.
- » Want more info about the coverage? Click the get information icon

Number of Companies: 497 - 1 2 3	4 5 6 7 20					25 50 100
Name 0	Symbol 0	Issuer 0	Investment Category	Last Close Price 0	Expense Ratio ©	Zacks ETF Rank * Repo
		All Issuers \$	All Categories \$			All Ranks \$
SHARES MSCI GLOBAL MIN VOL FACTOR ETF	ACWV	BLACKROCK	World ETFs	\$97.23	0.20%	<b>1</b>
ISHARES AGENCY BOND ETF	AGZ	BLACKROCK	Government Bond ETFs	\$117.77	0.20%	2
ALERIAN MLP ETF	AMLP	ALPS	MLP ETFs	\$30.44	0.87%	7
SHARES CORE AGGRESSIVE ALLOCATION ETF	ADA	BLACKROCK	Total Portfolio ETFs	\$66.53	0.25%	<b>1</b>
ISHARES CORE MODERATE ALLOCATION ETF	ADM	BLACKROCK	Total Portfolio ETFs	\$43.31	0.25%	<b>1</b>
SHARES CORE GROWTH ALLOCATION ETF	ADR	BLACKROCK	Total Portfolio ETFs	\$53.34	0.25%	2
ARK GENOMIC REVOLUTION ETF	ARKG	ARK INVESTMENT MANAGEMENT	Health Care ETFs	\$88.66	0.75%	2
ARK INNOVATION ETF	ARKK	ARK INVESTMENT MANAGEMENT	Technology ETFs	\$120.07	0.75%	-
ARK NEXT GENERATION INTERNET ETF	ARKW	ARK INVESTMENT MANAGEMENT	Technology ETFs	\$150.71	0.79%	7
NVESCO SENIOR LOAN ETF	BKLN	INVESCO	High-Yield/Junk Bond ETFs	\$22.16	0.65%	<b>1</b>
WANGUARD TOTAL INTERNATIONAL BOND ETF	BNDX	VANGUARD	Total Bond Market ETFs	\$56.98	0.08%	7
STOR DI COMPERO RADOLAVO NITI TROD DO ETE	<b>5</b> 110/	STATE STREET OF ORAL ADMOSODS	Developed Meder Based FTCs	\$00.50	0.0504	



### Not finding a research feature?

Some of the research resources and tools discussed in this section are not available in all versions of Advisor Tools.

To unlock these features, contact your Zacks representative or email advisortools@zacks.com.

#### Research History: Detailed Research reports for Equities & Specific Industries

- » Enter a ticker in the Ticker(s) input area. Enter multiple tickers separated by a comma to retrieve research for multiple companies.
- » Quick access to the Analyst, Quantitative Snapshot and Digest Reports. Click the report icons to view the individual reports.

Ticker(s):	Categories		Brokers	View Broker List
	All Reports	~	All Brokers	~
Date	Industries:		Reset	

- » Refine your search by customizing the Date, Categories, Brokers and/or Industries settings.
- » To get industry-specific reports, leave the ticker area blank, select the desired industry from the menu & click Search.

Industries:		Reset
AUTO -FOREIGN	~	Q Search

#### **Equity Select Lists**

Zacks Equity Select Lists serve as a starting point for long-term investors to build their portfolios.

After clicking on a **Select List**, you can receive more information about that Select List by clicking the **get information icon** next to the name of the list.

hitor	Zacks Research	<ul> <li>Marke</li> </ul>	t Strateg	y - Chart	ting - Screer	ning • News & Even	nts 👻
e Defa	Equity Ideas						
e Dela	Equity Select Lis	ts					
	Equity Model Po	rtfolios	•	Zacks Grov	wth Proxy (ZGRO	WE)	
-	Equity Research	Coverage		Zacks Cycl	lical Proxy (ZCYC	E)	
_	ETF Ideas			Zacks Earn	ings & Dividend	Quality (Large Cap)	
	ETF Model Portf	olios		Zacks Con	sistent Dividend	Growth (All Cap)	
	ETF Research C	overage					
k Clos	Mutual Fund Ide Mutual Fund Res			%Chg *	Volume ‡	Dividend Yield $\mbox{$\stackrel{\diamond}{=}$}$	
_	Research Histor		rage	1.22%	16,460,480	0.90%	
-	\$115.20 \$111	.96	\$0.84	0.76%	1,926,969	0.91%	
	\$264.42 \$263	00	\$1.07	0.75%	820 110	1 100/	

### **Equity Model Portfolios**

Use the Zacks Earnings Certain Portfolios and Focus List to meet individual investment objections.

After clicking on an **Equity Model Portfolio**, you can receive more information about the portfolios by clicking the **get information icon** next to the name of the list.

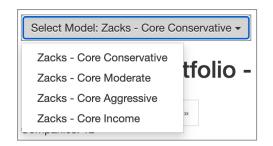
nitor	Zacks Research +	Market Strateg	iy - Chart	ting - Screer	ning - News & Events	▼ Table
re Defa	Equity Ideas Equity Select Lists	•	7.1.5			
	Equity Model Portfo Equity Research Co ETF Ideas ETF Model Portfolio ETF Research Cove	verage s	Zacks Earn Zacks Earn	ings Certain Port	niral Portfolio dend Aristocrats Portfolic	Up
ok Clos	Mutual Fund Ideas	uh Ouwers	%Chg 👻	Volume ¢	Dividend Yield \$	Expense
	Mutual Fund Resea Research History	rch Coverage	1.22%	16,460,480	0.90%	
	\$115.20 \$111.96	\$0.84	0.76%	1,926,969	0.91%	
	\$264.42 \$000.00	A1 07	0.75%	000 110	1 12%	

### **ETF Model Portfolios**

We offer a number of ETF Model Portfolios calibrated to meet the range of risk tolerances.

Note that these options are designed to work as diversified ETF portfolios — not necessarily as a list of individual ETF recommendations. The ETFs in each list were selected based on various factors, including the ETF's expense ratios and bid-ask spreads, as well as the Zacks ETF Rank which takes into account asset class forecasts.

After clicking on **ETF Model Portfolio** from the main menu, use the selection tool to select a portfolio to view:



After clicking on a specific ETF Model Portfolio, click on the information icon 🚯 to learn more about our ETF Model Portfolios, and how they can help with asset allocation.

Select the **Portfolio Changes** option to view the latest model change commentary. Select the performance icon to learn more about the performance and risk metrics of our ETF Model Portfolios.

ETF Model Po	ortfolio - Za	acks - Core Conservative <b>8</b> -	
		ETF Model Portfolio Info	
Number of Companies: 12	« <b>1</b> »	ETF Model Portfolio Changes	
Name 🌲	Symbol 🗘	ETF Model Portfolio Performance and Risk Metrics	Last Close
		All Issuers V All Categories V	

### **Market Strategy Reports**

- Weekly Sector and Market Earning Trends: Sheraz Mian, Zacks' Director of Research, offers earnings estimate revisions, expectations and analysis of US sectors.
- Monthly Economic Outlook: The Zacks Investment Committee provides detailed analysis of metrics affecting the U.S. economy.
- » Monthly Investing Update and Asset Allocation: Zacks Chief Equity Strategist, John Blank, provides forecasts for all major asset classes and our U.S. and global GDP growth outlook.
- Quarterly Top-Down Investing Consensus: Summarizes forecasts of many investment strategists for major asset classes and discusses reasoning underlying their outlooks.
- » Quarterly Global Macro Investing Consensus: Macro consensus forecasts of global commodity prices and foreign exchange rates.

Market Strategy -Charting -Screening -Market and Economic News (Daily)Sector and Market Earning Trends (Weekly)Market Analysis (Weekly)Global Week Ahead (Weekly)Economic Outlook (Monthly)Investing Update and Asset Allocation (Monthly)Top-Down Investing - Consensus (Quarterly)Global Macro Investing - Consensus (Quarterly)Industry Outlook



### **Quote Monitor Setup**

The first step to using the Quote Monitor is loading your custom tickers for Equities, Funds or Economic data.

### Manually enter ticker symbols to a New Watchlist

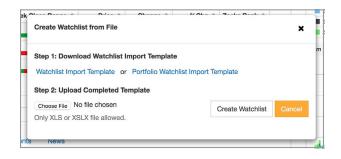
- » Click Create a New Watchlist
- Create a New Watchlist
- » On the dialog that appears:
  - > Select the type of watchlist being created (Equities, ETF, MF etc...)
  - > Enter a name for the new watchlist.
  - > Enter ticker symbols in the space provided.

**Note:** You can add/remove tickers at a later time as well.

Equities	ETF	MF	Indexes	Economic data	Portfolio	
ame your	new Fo	uity W	atchlist			-
i.e. My W						
nter ticke	r symbo	ols in th	ne field belo	w		

### Batch load ticker symbols to a new Watchlist

- » Click Create Watchlist from File
- Create Watchlist from File
- » On the dialog that appears:
  - > Download the Import Template in Step 1, complete the required fields highlighted in yellow and save the Excel file.
  - > Click Choose File and browse to the file you just saved.
  - After you have selected the file, click Create
     Watchlist to load the tickers into Quote Monitor.
  - > A new Watchlist will now appear in Advisor Tools with your entered information.



#### Make changes to an existing Watchlist

The **Options** menu provides multiple features that allow customization of the existing watchlists.

- » Add Ticker: Option to add more tickers to the watchlist.
- Add Metric to Data View: Allows customization of the items selected on the Data tab.
- Create/Edit Watchlist Alerts: Add alerts for changes in Zacks Rank, available reports and financial statements, earnings surprises and more.
- » Create/Edit Model Portfolios Alerts: Add alerts when stock enters or exits Zacks Equity Selects Lists.
- » Clear all Alerts: Remove all existing alerts.
- » Add Performance Chart: Creates mini chart with options for performance & percentage change.
- » Collapse/Expand: Minimizes or maximizes the watchlist window.
- > Hide: Remove the watchlist from view, but not delete the list permanently.
  - Hidden watchlists can be restored by selecting
     Manage Watchlists and using the hide/show icons
- » **Rename**: Change the name of the watchlist.
- » Delete: Completely and permanently remove the watchlist. This cannot be undone.

### Customize Watchlist Mini Chart

- » Select the symbol(s) to chart using the checkboxes next to each symbol.
- >> Use the **Options** menu to change display type to Technical, Performance, or 1 Year % Change.
- » **Delete** will remove the mini chart from current view.

Markets	ted 12:15	Options -		
Symbol	\$ 1 Day Return ≑	Annualized Return ≑	Chart c Export	ptions to PNG
SDJI	-1.48%	13.78%	Export	to PDF
SPX	-1.58%	11.64%	Delete	
COMPX	-1.96%	17.69%		63.01%
RU2TX	-3.16%	12.40%		41.99%
SP400	-2.41%	10.02%		33.19%

12:0	0 Click here to Collapse	<u>Options</u> -							
	Add ETF								
	Add Metric to Data View								
.	Create/Edit Watchlist Alerts								
\$	Create/Edit Model Portfolios Alerts								
%	Clear all Alerts								
%	Add Chart	•							
,.	Collapse								
%	Hide								
%	Rename								
	Delete								
%									

Manage Watchlists	Crea	te New Watchlist	Create Watchlist from File	Restor	re De	əfault V
Equity	•	ZECP		۲	2	
Exchange Traded Fu	inds 🕨	Sp5 - rec 1		<b>()</b>	×	
Mutual Fund	•	My Equity Watc	۲	2		
Index	•	FB		<b>()</b>	$\boldsymbol{\rho}^{\ell}$	
Economic	•	Zacks Earnings	<b>(</b> )	$\rho^\ell$		
Symbol 🔶 Name		Market Cap 5 B	illion	<b>()</b>	×	se Ra
oymoor Viame	,	CA Stone _ ETS	E Lligh Viold	<i>d</i>	×	ae ne

### **Portfolio Monitor Setup**

Manually enter, import your holdings or integrate with ByAllAccounts to view holdings, returns, alerts and news for your portfolios.

### Manually enter ticker symbols to create a New Portfolio

- » Click Create a New Portfolio
- Create a New Portfolio
- » On the dialog that appears:
  - > Select the type of portfolio being created (Tickers & Shares, Tickers & Weights or Tickers Only)
  - > Enter a name for the new watchlist.
  - > Enter ticker symbols in the space provided.

**Note:** You can add/remove tickers at a later time as well.

t .	÷		Value 🌣
Create a New Portfo	olio		×
Tickers & Shares	Tickers & Weight	Tickers Only	
-	kers & Shares Portf	olio	
i.e. My Portfolio			
Enter equity or ETF	or MF symbols in th	ne field below	
i.e. MSFT SPY PM	со		Add

### Batch load ticker symbols to a new Portfolio

- » Click Create Portfolio from File
- + Create Portfolio from File
- » On the dialog that appears:
  - > Download the Import Template in Step 1, complete the required fields highlighted in yellow and save the Excel file.
  - > Click Choose File and browse to the file you just saved.
  - > After you have selected the file, click Create Portfolio to load the tickers into Portfolio Monitor.

nt ÷	Value 🗧
Create Portfolio from File	×
Step 1: Download Portfolio Import Template:	
Tickers & Shares or Tickers & Weight or Tickers C	Dnly
Step 2: Upload Completed Template	
Choose File no file selected Only XLS or XLSX file and ODS is allowed.	Create Portfolio Cancel

> A new Portfolio will now appear in Advisor Tools with your entered information.

#### Make changes to an existing Portfolio

The **Options** menu provides multiple features that allow customization of the existing watchlists.

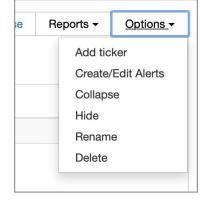
- » Add Ticker: Option to add more tickers to the portfolio.
- » Create/Edit Alerts: Add alerts for changes in Zacks Model Portfolios, Zacks Rank, earnings surprises and more.
- » **Collapse/Expand**: Minimizes or maximizes the portfolio window.
- » Hide: Remove the portfolio from view, but not delete the portfolio permanently.
  - > Hidden portfolios can be restored by selecting Client/Account Library, selecting the portfolio and clicking Add Portfolio
- » Rename: Change the name of the portfolio.
- » **Delete**: Completely and permanently remove the portfolio. <u>This cannot be undone</u>.

### **Client/Account Library**

The Client/Account Library provides easy access clients and accounts aggregated in ByAllAccounts, in addition to Portfolios created manually in Advisor Tools.

There are several ways to view Portfolios in ZAT using the Client/ Account Library:

- Clients: These are ByAllAccounts clients. Each client contains all accounts that you assigned to the client in the ByAllAccounts Console
- 2. Accounts: These are individual ByAllAccounts accounts. These accounts may or may not be assigned to clients
- **3. Groups:** These are groups of either ByAllAccounts accounts or clients that are grouped together in the Advisor Tools website
- **4. Custom:** These are manually created Portfolios created in the Advisor Tools website



Client/Account Library

Client/Account Library	value 🗸
Manage Groups	Search for Accounts Search
Category	Accounts
Accounts	Janet Smith 401(k)
Groups Tickers & Shares Tickers & Weight Model Portfolio	Fred and Wilma's Brokerage XXX0123
	Add Portfolio Cancel
	\$15,555.0U

NOTE: For detailed information about setting up ByAllAccounts refer to the manual provided under the Zacks Advisor Tools > Support > Manuals menu.

### Equity, Mutual Fund & ETF Detailed Views

Advisor Tools detailed views are accessed by either clicking on a ticker symbol within the system or using

the search feature found on the main menu.

APPLE	APPLE (AAPL) - Key Stats											
Key Stats	Quote Fundamental Chart	Performance Chart	Technical Chart	Zacks Research	Estimates	Quant Models	Peers	Attributes	Industry Outlook	News	Events	Financials
	ntal Surprise Chart MFM Surpris	se Chart 📲 Consensus	Model   👮 Zacks In	dustry Outlook   📆	Analyst Report	napshot Report						
												Options -
Company I	nfo		Income State	ement				Price Performa	ance			
Companyla	Wahaita		Dovonuo (TT)	A)		20/ 12	5 1.4	Current Price				120 52

» **Key Stats**: Many of the most popular metrics for quickly analyzing Zacks model scores, company data, financial statements and ratios. Categories include:

>	Valuation Ratios	>	Dividend & Shares
>	Liquidity and Solvency	>	Advanced Metrics
>	Management Effectiveness	>	Price Performance
>	Consensus Price Targets	>	Margins
>	Income Statement	>	Consensus Estimates
>	Balance Sheet	>	Employee Count Metrics
>	Cash Flow Statement	>	Zacks Alpha Scores

Quick Charting ability is available for many of the Key Stat metrics, just click on the hyperlinked items or small charts to view chart of selected item.



Select Export to Excel from the options menu to send all Key Stats to an Excel workbook for further analysis.

<u>Options</u> -
Export to Excel

- » **Quote**: General overview with latest quote, options data and key metrics.
- » Fundamental Chart & Performance Chart: Create, edit and save customized charts.
- » Zacks Research: Access Scorecard and research information with peer comparisons.
- » Estimates: Views include:
  - > Detailed Estimates
  - > Earnings Estimates
  - > Sales Estimates
  - > Agreement Estimate Revisions
  - > Magnitude Consensus Estimate Trend
  - > Upside Most Accurate Estimate Versus Zacks Consensus
  - > Surprise Reported Earnings History
  - > Annual and Quarterly Estimates By Analyst
- » Quant Models: Detailed view of Zacks Quant model output:
  - Includes Zacks Rank, Zacks Indicator Score, Style Scores, Earnings Quality, Price Response & Insider Rank.



- Peers: View comparisons for peers, sectors and industries across multiple categories and data items.
  - > Graphical display shows magnitude of differences:

Price Momentum								
Peers ÷	Relative Strength 52 weeks	Relative Strength 2						
APPLE INC (AAPL)	87	88						
AMAZON.COM INC (AMZN)	75	81						
3D SYSTEMS CORP (DDD)	90	g						
ALPHABET INC-A (GOOGL)	71	77						
HP INC (HPQ)		82						
INTL BUS MACH (IBM)	41	30						

- Attributes: Tabular view of data items by categories, with customization options to include or exclude sector, industry and peer data.
- Apple Attributes (AAPL) < Key Stats Quote **Fundamental Chart** Performance Chart Technic Receivables Turnover Inventory Turnover Asset Utilization Δ Leverage Valuation \$ Liquidity & Coverage Valuatio Price/Book Value Uncertainty in Analyst Estimate Cash Flow Per Share Variability of Growth Rates Neglect Ratios Price/Cash Flow Margins Income Statement Price/Sales Annual Quarterly Enterprise Value/EBITDA Balance Sheet
- Industry Outlook: Zacks Report view containing detailed industry commentary, projections and recommendations.

Zacks Equity Research

March 17, 202[.]

S. Riverside Plaza, Suite 1600 - Chicago, II 60

Industry Outlook

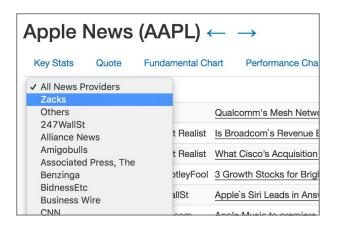
www.zacks.com

Players in the Zacks Retail – Discount Stores industry that have been gaining amid the pandemic-led increased at-home consumption and stock hoarding are likely to witness some pullback in demand in the near term as the likely to a tikely to build up demand for traditional categories. Apart from this, mestiment associated with digital fulfilment as well as high COVID-related expenses are likely to keep margins under pressure.

Nonetheless, industry participants have been focusing on deepening engagements with consumers, adding more compelling products, and enhancing digital and data analytics capabilities. Constant efforts to enhance ornichannel operations have been working in favor of costec Whelesale Corporation (COST), Target Corporation ( TGT), Dolar General Corporation (DG) and Big Lots, Inc. (BIG).

The Zacks Retail – Discount Stores industry comprises companies that offer apparel, accessories, footwear, beauty products, personal and baby care products, cleaning products, per supplications, and food and beverage products. The industry – footback company company industry industry – to the company of the company of

- » News: View ticker specific news.
  - > Use the list control to isolate the provider news displayed:



» Events: Calendar or list view enables event filtering for entire universe of securities or a single stock.

Enter specific ticker symbols to see events for only that ticker.

	SEARCH BY TICKER: Search
【 Week of ♥ May ♥ 17 ♥ 2017 ♥ 】 ticker list ♥	Image: Construction     Go       Image: Construction     Go       Image: Construction     Reset       Image: Construction     WEEK:       Image: Construction     Reset
Select the date using	Select the types of events
the drop downs.	you would like displayed.

- » **Financials**: View income, balance sheet, cash flow, segment info & key metrics for annual or quarterly periods.
  - > Options allow viewing standard vs company-specific statements & restated vs originally reported.

Ticker Reporting Basis Period From To Form Type	Report Form		ate Type		
AAPL Annual 🛇 Last 10 文 1977 🗘 2018 🗘 Income Statement	Company S	pecific 😒 Mo:	st Recent ᅌ	Update report	
APPLE INC FYE=9 (September) Annual - Income Statement - Company Specific					
Fiscal period	<u>2016</u>	<u>2015</u>	<u>2014</u>	<u>2013</u>	20
Period End Date	9/30/2016	9/30/2015	9/30/2014	9/30/2013	9/30/
Net Sales	215,639.00	233,715.00	182,795.00	170,910.00	156
Total Revenues	215,639.00	233,715.00	182,795.00	170,910.00	156
Cost of sales	131,376.00	140,089.00	112,258.00	106,606.00	87
Gross Profit	84,263.00	93,626.00	70,537.00	64,304.00	68
Research and development	10,045.00	8,067.00	6,041.00	4,475.00	3
Purchased in-process research and development					
Selling, general, and administrative	14,194.00	14,329.00	11,993.00	10,830.00	10
Postauturing Costs					

- > **Reporting Basis**: Select Interim or Annual.
- > **Period**: Select one of the preset options or Other and enter custom From & To.
- > **Form Type**: Using the dropdown list select any of the available view types.
- > Report Format: Standard (utilizes a template to combine "like" items) or Company Specific (as reported by the company)
- > **Update Type**: Most Recent (restated data) or Orig. Reported (non-restated data)
- > **Update Report Button**: Select to refresh view with options selected in prior steps.
- > Click **Export to Excel** button (🔀) to copy data to an Excel worksheet.

- » **Find Similar**: Quickly find funds within the same category as the active fund.
  - > Additional criteria can be entered to further narrow down the results as well.

FIDELITY SELECT FINANCIAL SERVICES (FIDSX) - FINANCIAL - Find Similar										
Key Stats	Quote	Profile	Find Similar	Com	pare Funds Perfor	mance Cha	art Zacks Research	Holdings Da	ata News	Events
Selecte	d View: Overvi	ew 🕶	Zacks Rank : Equal	s 1 🕶	Share Class : All -	Top : 10 🕶	By: Expense Ratio -	Then Top : All 👻	By 🕶	

- > Enter a Mutual Fund ticker in the main search bar.
- > Click the **Find Similar** tab
- > Using the dropdown menus:
  - > Pick a Selected View
  - > Apply Zacks Rank filter
  - > Apply Share Class filter
  - > Use the **Top** option to determine how many similar funds will be displayed
  - > **By** will determine what item is used with the **Top** parameter.

Example: **Top**: 10 **By**: 1 Year Total Return will display the top 10 mutual funds with the best 1 year Total Return.

- > For additional filtering continue by adding a secondary **Top** and **By** filter.
- » Holdings Funds: View Mutual Fund or ETF holdings data by clicking on the Holdings tab

					Search:		
Symbol 🍦	As of Date	Shares 🍦	MV 🔻	Weight 🍦	Company Name	÷	Issue
с	11/30/2020	509,500	28,058,164.00	6.01 %	CITIGROUP INC		COMMON
BAC	11/30/2020	940,100	26,473,216.00	5.67 %	BANK OF AMERICA CORPORATION		COMMON
WFC	11/30/2020	917,490	25,093,352.00	5.38 %	WELLS FARGO & CO		COMMON
MS	11/30/2020	404,500	25,010,235.00	5.36 %	MORGAN STANLEY		COMMON
TRV	11/30/2020	169,000	21,910,850.00	4.70 %	THE TRAVELERS COMPAI	NIES	COMMON
COF	11/30/2020	195,900	16,776,876.00	3.60 %	CAPITAL ONE FINANCIAL	CORP	COMMON
PNC	11/30/2020	95,100	13,130,457.00	2.81 %	PNC FINANCIAL SERVICE GROUP	S	COMMON

» Compare Funds: Compare and analyze a manually entered list of funds or Watchlist.

FIDELITY SELECT FINANCIAL SERVICES (FIDSX) - Compare Funds											
Key Stats	Quote	Profile	Find Similar	Compare Funds	Performance	Chart	Zacks Research	Holdings	Data	News	Events
Selected V	Selected View: Overview   Manage Fund Peer Tickers Display Tickers From Peer Funds										

- > Enter a Mutual Fund ticker in the main search bar.
- > Click the Find Similar tab
- > Using the dropdown menus:
  - > Pick a Selected View
  - > Use the Manage Fund Peer Tickers menu to manually add funds to the list.
    - > Search for or enter a fund ticker in the space provided.
    - > Click Add to add that ticker to the compare list.

Manage Fund Peer Tickers	3
Enter mutual funds or names separated by a space	
i.e PMCO total Return	Add
No Tickers	
	Close

- > From the Display Tickers From menu select "PEER FUNDS"
- > Select a Watchlist from the Display Tickers From menu to import a specific Watchlist into the Compare Funds view.

Display Tickers From	None -	
nd Name 🗢 Mo	None MF watchlist: Default MF Watchlist	Year
	MF watchlist: My Mutual Fund Watchlist Peer Funds	
	All MF watchlists	

### Charting

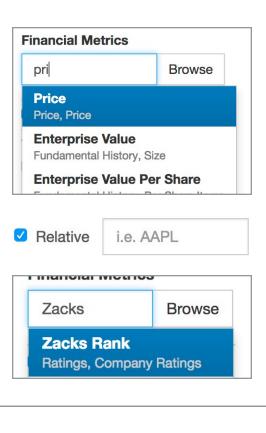
The charting features available within Zacks Advisor Tools allow for saving chart templates, a simple process to add/remove tickers, automated loading of Watchlist tickers, plotting multiple metrics and many other options.

	Charting -	Screening -					
	Fundamental Chart						
	Performance Chart						
1	Technical Chart						

### **Fundamental Charts**

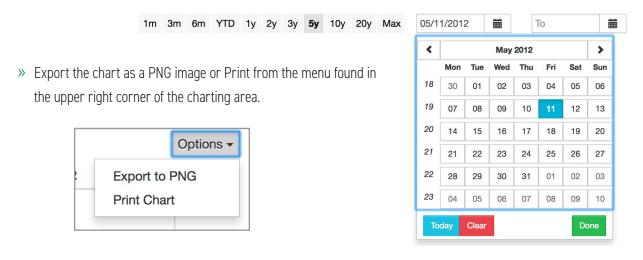
- » Enter an Equity, Economic or Index ticker.
  - The entry areas utilize Intellisense for quickly finding results; just start typing a ticker or name until your desired item is displayed. Click the **ADD** button or press **ENTER** to make selection.
  - Economic & Index areas also have a Browse button if a more detailed search is needed.
- » Select a Financial Metric to plot on the chart
  - > There are 2 methods to make this selection:
- 1. Type a keyword and let Intellisense feature provide a list of options.
- 2. Click **Browse** and search the categories and items to make a selection.
  - If viewing metrics versus a relative ticker is desired, check the **Relative** box and enter the desired ticker.
  - > The Zacks Rank is now available as a metric to be included on any chart. It can be easily searched for or found under Ratings > Company Ratings.

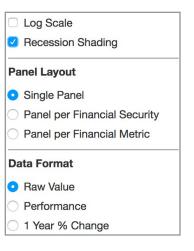
Securities						
i.e. MSFT		Add				
Economics						
i.e. US Retail Sales	В	rowse				
Indexes						
s&p 500	в	rowse				
S&P 500 Domestic- Cap-Based Index/Broad Market						



Zacks Rank	
<b>1</b> Strong Buy	Why can't I see the Zacks Rank? The Zacks Rank for stocks, ETFs and mutual funds is not available in
2 Buy	all versions of Zacks Advisor Tools.
3 Hold	To enable access to the Zacks Rank, contact your Zacks representative or
4 Sell	email <u>advisortools@zacks.com</u> .

- » Customize remaining options to create desired chart layout.
  - > **Log Scale**: Check this box to create logarithmic scaled charts.
  - > Recession Shading: Display periods of economic recession on the chart.
  - Single Panel: All tickers and metrics are displayed within one chart when selected.
  - Panel per Financial Security: A panel is added to the chart for each identifier entered.
  - Panel per Financial Metric: Each active metric will be displayed in a panel for all identifiers.
  - > **Raw Value**: No transformation of data, values represent the "raw" data stored.
  - > **Performance**: Each series is transformed to a growth series and based to zero.
  - > 1 Year % Change: The series are converted to 1yr % change format and ploted on each panel.
- » Select a time period using either the preset options or entering custom From & To dates.





- > Open Library, Save, Save As, and Close options are available on the main chart menu to assist with managing your chart templates and library.
  - > After setting all chart options, simply save chart to your library for reference later.
  - Retrieve your chart templates and view the Zacks pre-defined charts using **Open Library** to load the desired chart view.

Saved Charts	
Select action -	
Open Library	_
Save	
Save As	
Close	-
L	

### **Performance Charts**

Performance charting options are similar to Fundamental charts, but several differences are noted below.

» Additional option to link the chart to your watchlists.

Display Tickers From

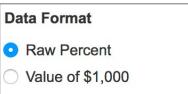
MF watchlist: MY%20MF%201 -

» Select either Price Return or Total Return.

### Performance Format

- Price Return
- Total Return

» Format the data as either a Raw Percent change or growth of \$1,000.



### **Technical Charts**

Technical charting provides multiple options for plotting some of the most popular technical metrics on a single chart.

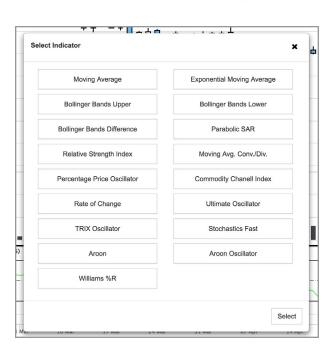
» Use the Browse feature to select the desired Indicators.

#### Indicators

Indicator

Browse

Select the desired indicator and then click the
 Select button to proceed.



» After selecting the indicators, set the parameters for each indicator.



» Additional chart options include selecting a style (Line vs Candlesticks) and Period (Daily, Weekly or Monthly).

Chart Style				
Candlestick -				
Period				
Daily -				

### Screening Equities, Mutual Funds and ETFs

Advisor Tools provides easy to use screeners for Equities, Mutual Funds and ETFs. To begin the screening process, select **Screening** from the main Advisor Tools menu and then the desired screener type (Equity, ETF or Mutual Fund).

Screening -	News & Even		
Equity Screer	ner		
ETF Screener			
Mutual Fund Screener			

### Using Zacks Predefined Screening Strategies

Zacks' Screens will help you find the types of companies that meet your criteria. Zacks has included several screens that many investors use on a regular basis to find potential winners.

Start by selecting Screening > Equity Screener from the main menu and then click the Open Screen Library button.

**Open Screen Library** 

i.e All Cap Growth		Oper
Category Core Growth & Income Momentum Short-sell Value Saved Screens	Strategy Growth and Value Stocks Plus Zacks #1 Rank Model Zacks Strong Buys & Buy Top VGM Buys Underfollowed Stocks Upgrades and Revisions VGM A's, Zacks #1 Rank XL Large-Caps with the Best Zacks Rank Zacks Building Blocks Zacks Rank Upgrades	Details No need to choose between growth and value with this screen you can have them both and the Zacks #1 Rank.
		Open

- » You can now select from the many predefined strategies included with your subscription. To view or run the criteria used for each strategy, simply click on the **Open** button from the Library view.
- » Edit the Zacks Strategy criteria by clicking the **Edit as User Screen** button.
  - > After saving the strategy in the user's Saved Screen library, the criteria fields can be edited to customize the results.

Criteria Edit as User Screen						
% Change Price - 4 Weeks >= 0						
Est. One Year EPS Growth F(1)/F(0) >= 10						
Last EPS Summing (%) >0						

### Creating a New Screen

If you're interested in creating your own stock screens with custom parameters, click the **New User Screen** button and then follow the steps noted below.

New User Screen

#### Step 1:

» Click **Browse** to navigate the item categories to find desired data items.

#### OR

Utilize Intellisense to quickly find data metrics; just start typing an item name until your desired item is displayed.

P/E		Browse
PE FY1	Ratios	
PE FY2	Ratios	
PE F12M	Ratios	
PE TTM	Ratios	
PE TTM 5 Year High	Ratios	
PE TTM 5 Year Low	Ratios	
DE TTM 5 Voor Avorago	Ratios	

### Step 2:

» Enter criteria for your selected item and click Add.

>=	•	Add

### Step 3:

» After selecting all data items run the screen and view results by clicking the **Run Screen** button.

i.e. Zacks Rank	Browse	>= •	Add
Universe : All	•		
Criteria		Display Metrics	Add Table Builder Items Add Metric
Zacks Rank 😡 < 3	ţ Q	Company 🕑	
	×	Ticker 🚱	
		Zacks Rank 🕑	I X
Ve found 916 tickers.			
lide criteria			Run Screen Save Screen

### Editing a Screen

After successfully running the screen criteria there are additional options available to modify, export or change the results view.

» Edit Criteria option will return you to the data item selection area where you can modify the criteria.

Criteria		
Zacks Rank 2 < 3	t C	×

- » Export to Excel option is available when viewing your screen results (upper right).
  - > When selected, this will export all items and stocks, funds or ETF tickers to an Excel CSV file.



» Display Metrics allows selection of items to include with the output, but these items do not require criteria for screening. Items are added as display only.

Display Metrics	Add Table Builder Items	Add Metric
Company		
Ticker 🕑		
Zacks Rank 😨		1 ×

- > Click Add Table Builder Items or Add Metric and then select the items or saved table items to include as display only.
- > Run the screen again to view new results.

### Stock, ETF and Mutual Fund Table Builders

Our Table Builders allow you to bring in tickers from your watchlists and add up to 25 metrics to compare your stocks, ETFs or mutual funds. With Table Builder, you have spreadsheet functionality within Advisor Tools, so you can easily prepare "comp sheets" for various holdings.

### **Building a Table**

- » Choose a watchlist you wish to use from the Display Tickers From pulldown menu.
- » Use the Add Metric option under the Options pulldown menu at right to select financial metrics to compare. You may select up to 25 metrics.

Select Financial Metrics						
i.e Market Cap		Add				
Category	Metric	Details				
Company	Descriptive	Category:				
Price and Price Changes	Company Name	Company				
Ratings	Ticker					
EPS - Surprises and Estimate Revisions	Exchange Traded	SubCategory:				
Sales Estimates and Surprises Growth	Exchange Ticker Zacks Master Ticker	Descriptive				
Batios	Company Type Code	Financial Metric:				
Income Statement	Country Domicile Code	i manoiai moutoi				
Balance Sheet	Options Exist (Y/N)	Company Name				
EPS - Actual and Estimates	Fiscal Month End (mm)					
Quantitative Scores	SIC Code					
	# of Employees	Add metric				
	Zacks Sector Codes (0-17)	. Idd moulo				

Display Tickers From Equity watchlist: My Equity Watchlist -

### Opening and Saving a Table

ï

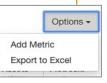
» Use the Select Action pulldown menu at left to open an existing table, save a table, or to rename or delete tables.

Select act	tion <del>+</del> 1	Test		Display Tickers From	Equity watchlis	st: My Equit	Watchlist -						Options -
Symbol ‡	↔ ⑧ PE TTM ≑	↔ 🛞 Market Capitalization (\$mil) ≎	⇒ S ↔ Dividend Yield % ‡	Long Term Debt/Common Equity \$	⇒ Sales Q0 TTM/Q-4 TTM ≑	↔ 🛞 EPS Q- 0/Q-4 ‡	Beta vs Russell 2	8000 ( nths ) \$	⇔ 🛞 PE TTM 5 Year High ‡	Surprise - Average EPS Surprise - Last 4 Quarters ≑	⇔ 🛞 Piotroski ROA signal ≑	↔ 🛞 Total Current Assets Annual (\$Mil) ≑	⊷ () Piotrcski Score 3
AAPL	15.50	\$926,356	1.55%	0.79	9.38%	7.46%		0.82	20.64	3.47%	1	\$131,339	
MSFT	27.03	\$899,104	1.58%	0.82	19.82%	14.58%		0.65	28.95	9.26%	1	\$169,662	
XOM	16.13	\$340,437	4.08%	0.10	12.12%	71.59%		0.79	40.79	7.28%	1	\$47,973	
JNJ	16.96	\$372,118	2.60%	0.46	6.71%	13.22%		0.37	19.72	1.61%	1	\$46,033	
GE	15.09	\$86,478	0.40%	1.85	-0.39%	-37.04%		0.99	23.38	3.03%	0	\$121,917	
тмо	24.18	\$107,272	0.28%	0.64	16.44%	16.49%		0.68	23.64	3.13%	1	\$10,625	1
AMZN	87.72	\$867,316	0.00%	0.54	30.93%	179.63%		1.23	963.48	88.81%	1	\$75,101	
NVDA	29.92	\$106,959	0.36%	0.21	20.61%	-63.06%		1.53	53.10	10.28%	1	\$10,557	

### Exporting a Table

>> Use the Export to Excel option under the Options pulldown menu at right to export your table into an Excel spreadsheet.

NOTE: Data exported to an Excel spreadsheet is no longer dynamic. If you wish to create Excel spreadsheets with dynamic data, talk to us about our Zacks Excel Link plug-in.



# AdvisorTools

### **Customer Support**

If you ever have questions about Zacks Advisor Tools or need assistance, please contact us using the information below and we'll be happy to assist you.



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advisortools@zacks.com