



ZACKS
AdvisorTools

Quick Start Guide 2021

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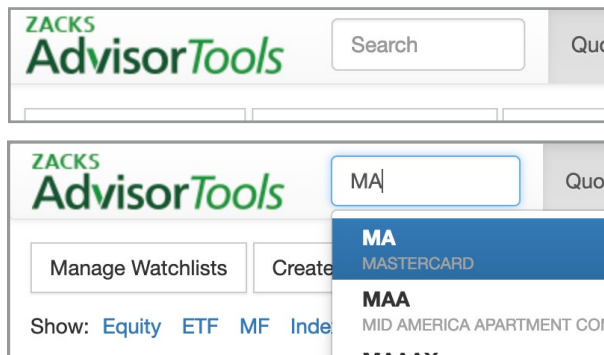
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Getting Started

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 Watchlist EQUITY Updated 10:05 Options ▾

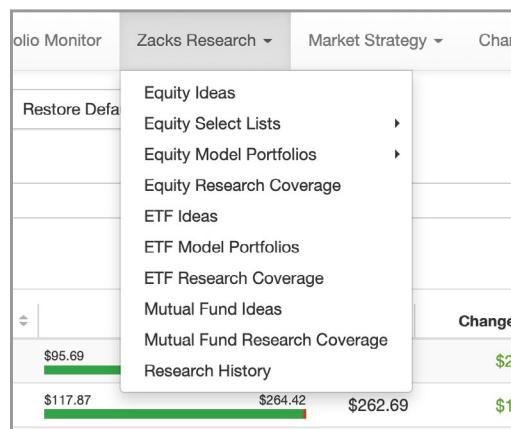
Overview **Zacks Research** Quant Models Data Events News

| Symbol | Name | 52 Week 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 |
| INL | Invesco S. Index | \$110.99 - \$128.96 | \$127.42 | -\$0.24 | -0.19% | 3 |


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














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 

Exchange-Traded Funds Research Coverage 

Number of Companies: 497

| Name | Symbol | Issuer | Investment Category | Last Close Price | Expense Ratio | Zacks ETF Rank | Report |
|--|--------|---------------------------|--------------------------|------------------|---------------|----------------|---|
| iSHARES MSCI GLOBAL MIN VOL FACTOR ETF | ACWV | BLACKROCK | World ETFs | \$97.23 | 0.20% | |  |
| iSHARES AGENCY BOND ETF | AGZ | BLACKROCK | Government Bond ETFs | \$117.77 | 0.20% | |  |
| ALERIAN MLP ETF | AMLX | ALPS | MLP ETFs | \$30.44 | 0.87% | |  |
| iSHARES CORE AGGRESSIVE ALLOCATION ETF | ACA | BLACKROCK | Total Portfolio ETFs | \$86.53 | 0.25% | |  |
| iSHARES CORE MODERATE ALLOCATION ETF | ACM | BLACKROCK | Total Portfolio ETFs | \$43.31 | 0.25% | |  |
| iSHARES CORE GROWTH ALLOCATION ETF | ACR | BLACKROCK | Total Portfolio ETFs | \$53.34 | 0.25% | |  |
| ARK GENOMIC REVOLUTION ETF | ARKG | ARK INVESTMENT MANAGEMENT | Health Care ETFs | \$88.66 | 0.75% | |  |
| 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 | 0.75% | |  |
| INVESCO SENIOR LOAN ETF | BKLN | INVESCO | High-Yield/Low Bond ETFs | \$22.16 | 0.65% | |  |
| VANGUARD TOTAL INTERNATIONAL BOND ETF | BNDX | VANGUARD | Total Bond Market ETFs | \$56.98 | 0.08% | |  |



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 advisorstools@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.**
- » 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.

Ticker(s):

Categories: All Reports

Brokers: All Brokers [View Broker List](#)

Date: Last 30 Days

Industries: All Industries

[Reset](#)

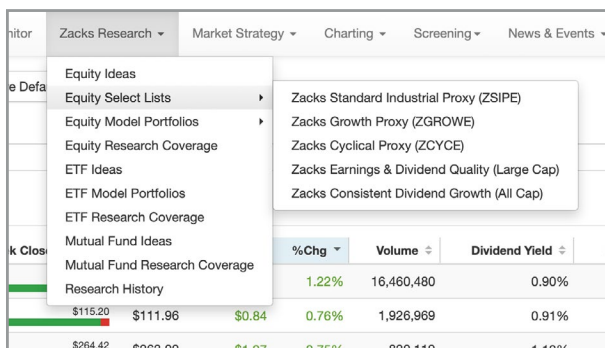
Industries: AUTO -FOREIGN

[Reset](#)

Equity Select Lists

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

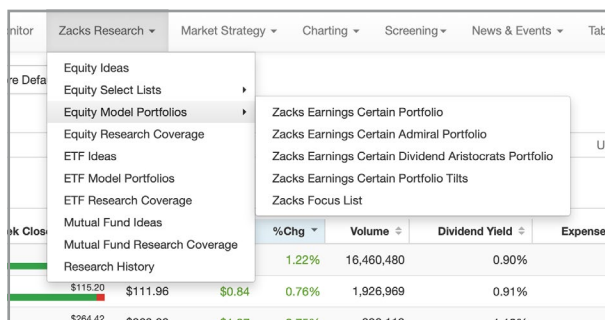
i After clicking on a **Select List**, you can receive more information about that Select List by clicking the **get information icon** next to the name of the list.



Equity Model Portfolios

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

i 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.

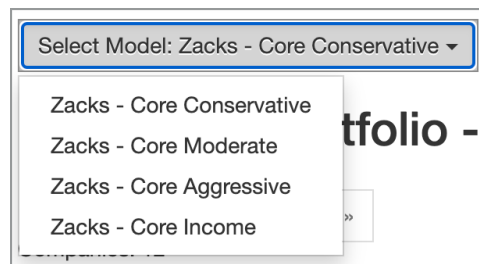



ETF Model Portfolios

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

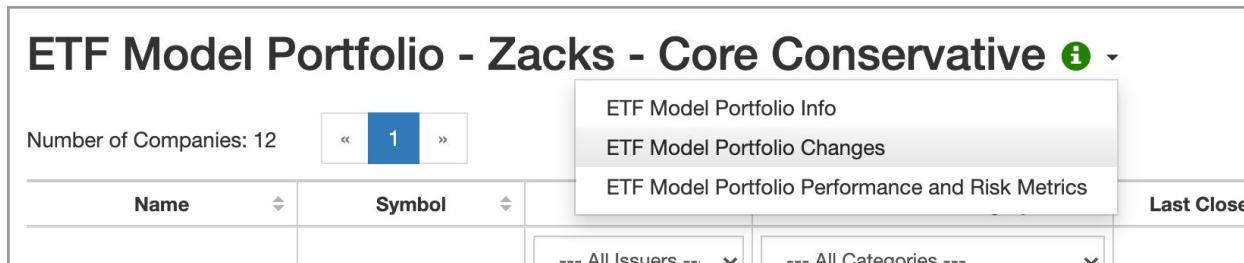
Note that these options are designed to work as diversified ETF portfolios – not necessarily as a list of individual ETF recommendations. The ETFs in each list were selected based on various factors, including the ETF's expense ratios and bid-ask spreads, as well as the Zacks ETF Rank which takes into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

Number of Companies: 12 « 1 »

ETF Model Portfolio Info
 ETF Model Portfolio Changes
 ETF Model Portfolio Performance and Risk Metrics

| Name | Symbol | Last Close |
|------------------------|--------|------------|
| --- All Issuers --- | | |
| --- All Categories --- | | |

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:**

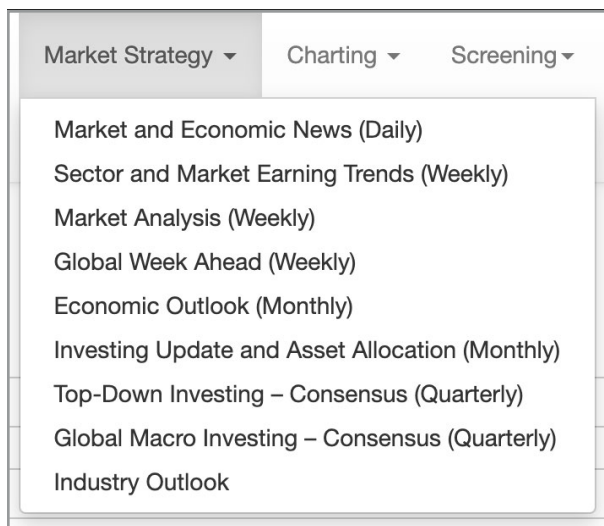
Zacks Chief Equity Strategist, John Blank, provides forecasts for all major asset classes and our U.S. and global GDP growth outlook.

» **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

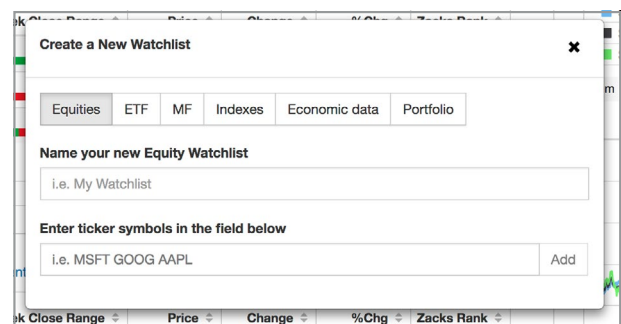
- » Click **Create a New Watchlist**

+ 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.



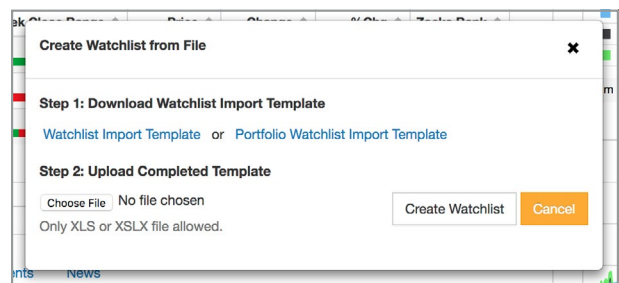
Batch load ticker symbols to a new Watchlist

- » Click **Create Watchlist from File**

+ Create Watchlist from File

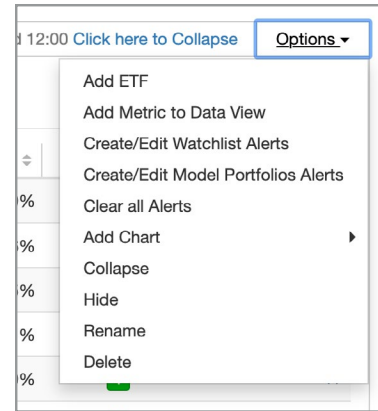
- » On the dialog that appears:

- > 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.



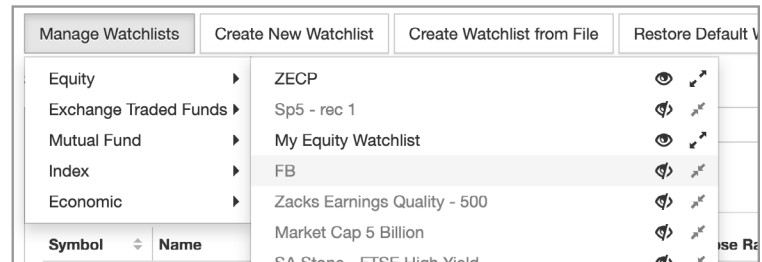
Make changes to an existing Watchlist

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.



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.

Batch load ticker symbols to a new Portfolio

- » Click **Create Portfolio from File**

+ Create Portfolio from File

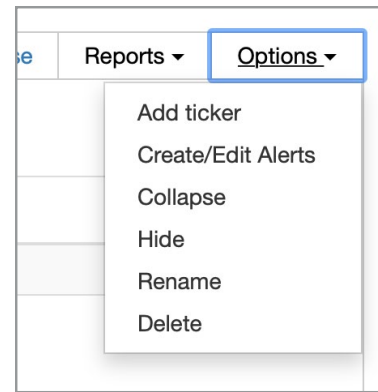
- » On the dialog that appears:

- > 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**.
- > 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. This cannot be undone.



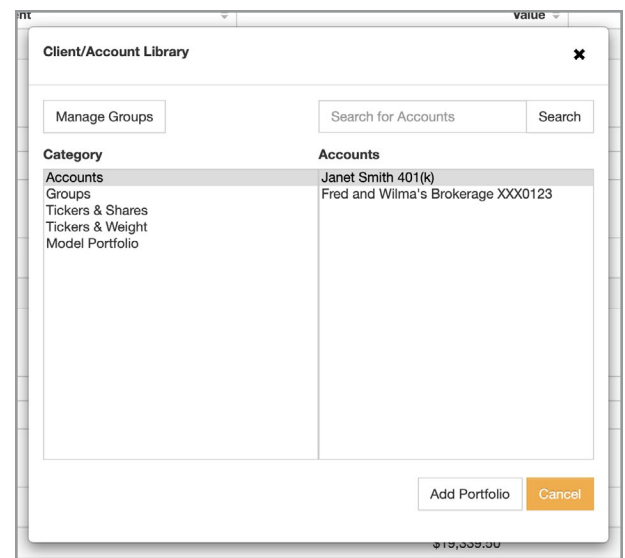
+ Client/Account Library

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:

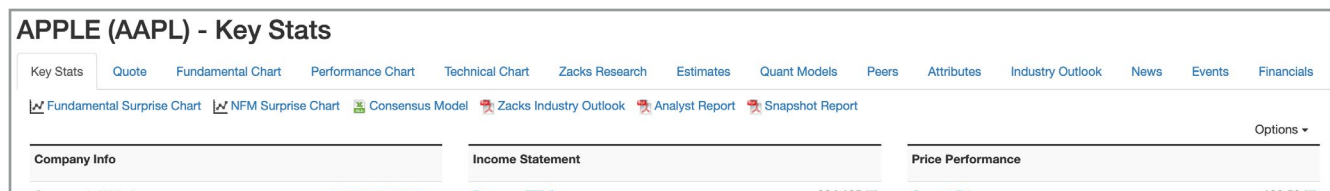
1. **Clients:** These are ByAllAccounts clients. Each client contains all accounts that you assigned to the client in the ByAllAccounts Console
2. **Accounts:** These are individual ByAllAccounts accounts. These accounts may or may not be assigned to clients
3. **Groups:** These are groups of either 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



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

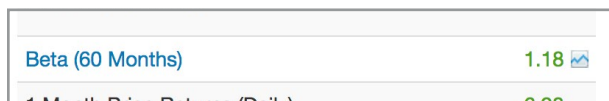
Equity, Mutual Fund & ETF Detailed Views

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.

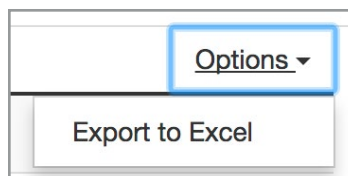


» **Key Stats:** Many of the most popular metrics for quickly analyzing Zacks model scores, company data, financial statements and ratios. Categories include:

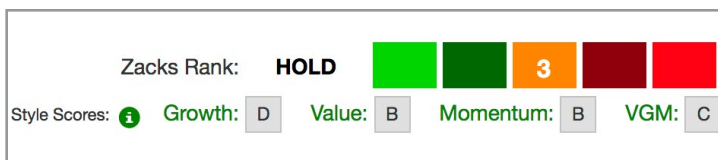
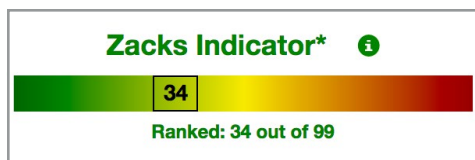
- > Valuation Ratios
 - > Liquidity and Solvency
 - > Management Effectiveness
 - > Consensus Price Targets
 - > Income Statement
 - > Balance Sheet
 - > Cash Flow Statement
 - > Dividend & Shares
 - > Advanced Metrics
 - > Price Performance
 - > Margins
 - > Consensus Estimates
 - > Employee Count Metrics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



- » **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 | 94 |
| ALPHABET INC-A (GOOGL) | 71 | 77 |
| HP INC (HPQ) | | 82 |
| INTL. BUS. MACH. (IBM) | 41 | 30 |

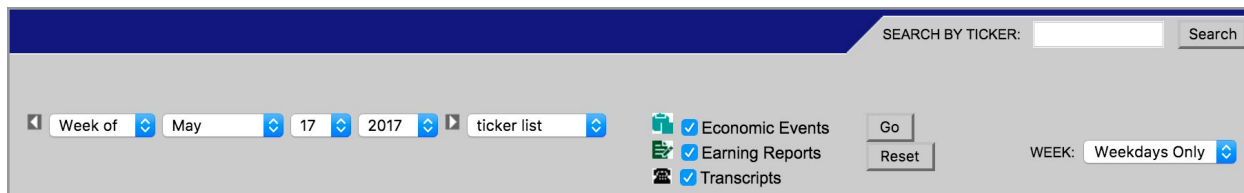
» **Attributes:** Tabular view of data items by categories, with customization options to include or exclude sector, industry and peer data.

» **Industry Outlook:** Zacks Report view containing detailed industry commentary, projections and recommendations.

» **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.



Select the date using the drop downs.

Select the types of events 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 Format | Update Type | |
|---|------------------------|------------|------------|------------|------------------|------------------|---------------------------|
| AAPL | Annual | Last 10 | 1977 | 2018 | Income Statement | Company Specific | Most Recent Update report |
| APPLE INC FYE=9 (September) | | | | | | | |
| Annual - Income Statement - Company Specific | | | | | | | |
| | Fiscal period | 2016 | 2015 | 2014 | 2013 | 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 | |
| Restructuring 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** Compare Funds Performance Chart Zacks Research Holdings Data News Events

Selected View: Overview ▾ Zacks Rank : Equals 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.

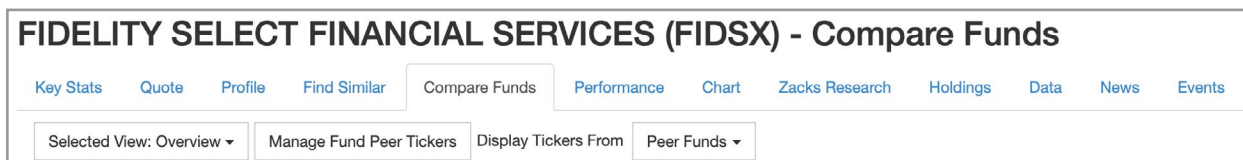
Example: **Top: 10 By: 1 Year Total Return** will display the top 10 mutual funds with the best 1 year Total Return.

> For additional filtering continue by adding a secondary **Top** and **By** filter.

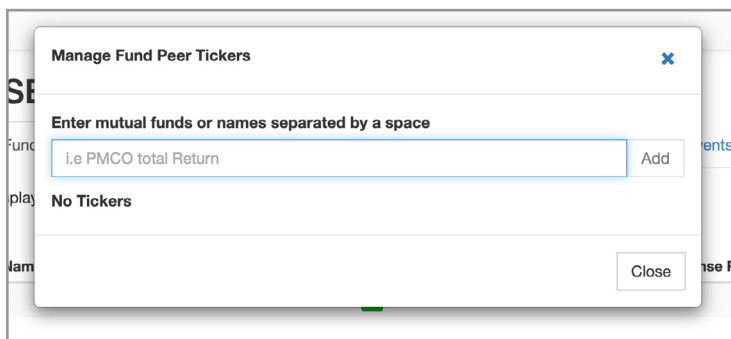
» **Holdings Funds:** View Mutual Fund or ETF holdings data by clicking on the **Holdings** tab

| Symbol | As of Date | Shares | MV | Weight | Company Name | Issue |
|--------|------------|---------|---------------|--------|------------------------------|--------|
| C | 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 COMPANIES INC | 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 SERVICES GROUP | COMMON |

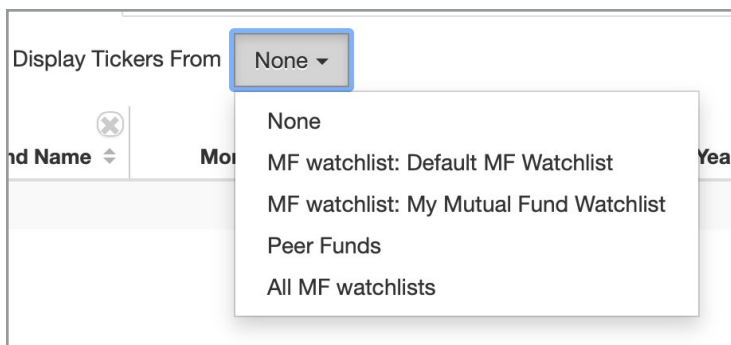
» **Compare Funds:** Compare and analyze a manually entered list of funds or Watchlist.



- > 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.

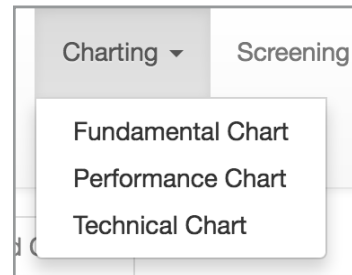


- > From the Display Tickers From menu select "PEER FUNDS"
- > Select a Watchlist from the Display Tickers From menu to import a specific Watchlist into the Compare Funds view.



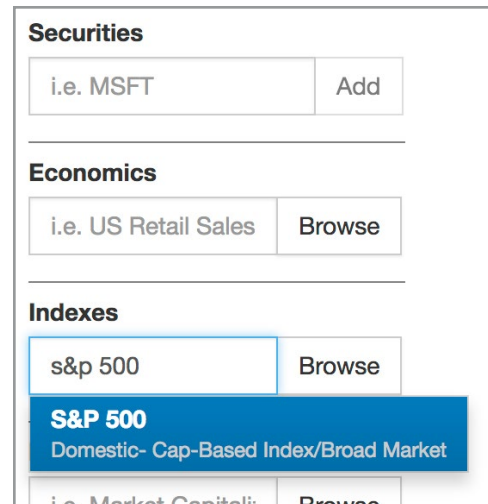
Charting

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.

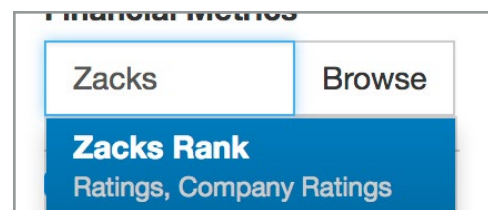
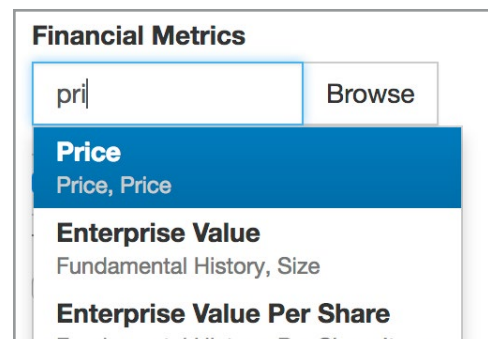


Fundamental Charts

- » 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**.



Zacks Rank

1 Strong Buy

2 Buy

3 Hold

4 Sell

Why can't I see the Zacks Rank?

The Zacks Rank for stocks, ETFs and mutual funds is not available in all versions of Zacks Advisor Tools.

To enable access to the Zacks Rank, contact your Zacks representative or email advisorstools@zacks.com.

» 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 plotted on each panel.

Log Scale

Recession Shading

Panel Layout

Single Panel

Panel per Financial Security

Panel per Financial Metric

Data Format

Raw Value

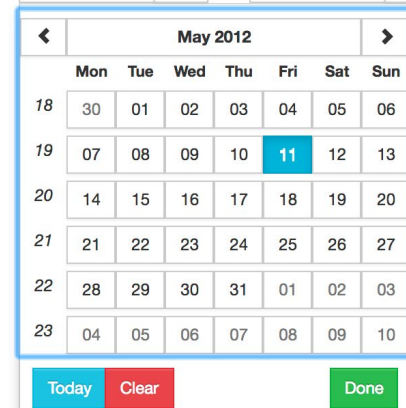
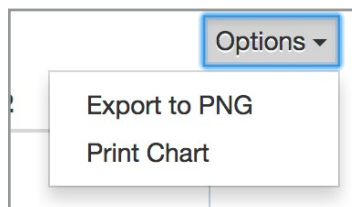
Performance

1 Year % Change

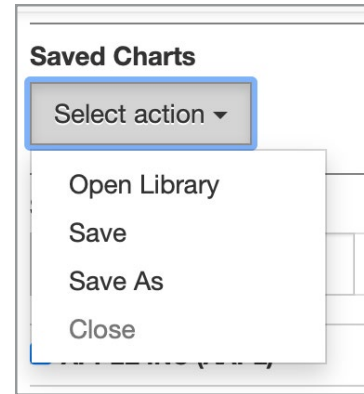
» Select a time period using either the preset options or entering custom From & To dates.

1m 3m 6m YTD 1y 2y 3y **5y** 10y 20y Max

» Export the chart as a PNG image or Print from the menu found in the upper right corner of the charting area.



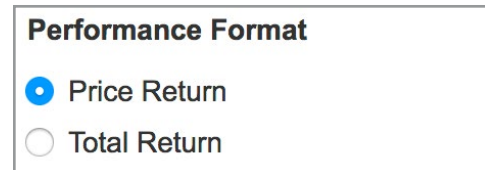
- » **Open Library, Save, Save As,** and **Close** options are available on the main chart menu to assist with managing your chart templates and library.
 - > After setting all chart options, simply save chart to your library for reference later.
 - > Retrieve your chart templates and view the Zacks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



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.
- » Select either Price Return or Total Return.
- » Format the data as either a Raw Percent change or growth of \$1,000.



Technical Charts

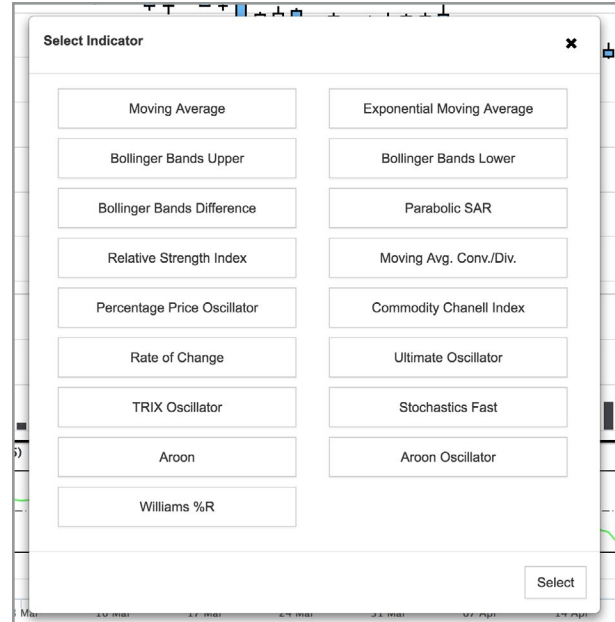
Technical charting provides multiple options for plotting some of the most popular technical metrics on a single chart.

- » 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.

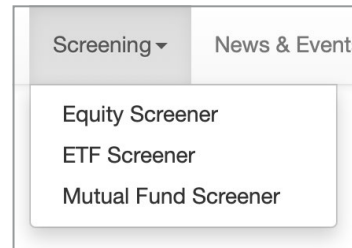
| Indicators | | |
|--|-----|---------------|
| Indicator | | Browse |
| <input checked="" type="checkbox"/> Moving Average | 50 | X |
| <input checked="" type="checkbox"/> Moving Average | 200 | X |

- » 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

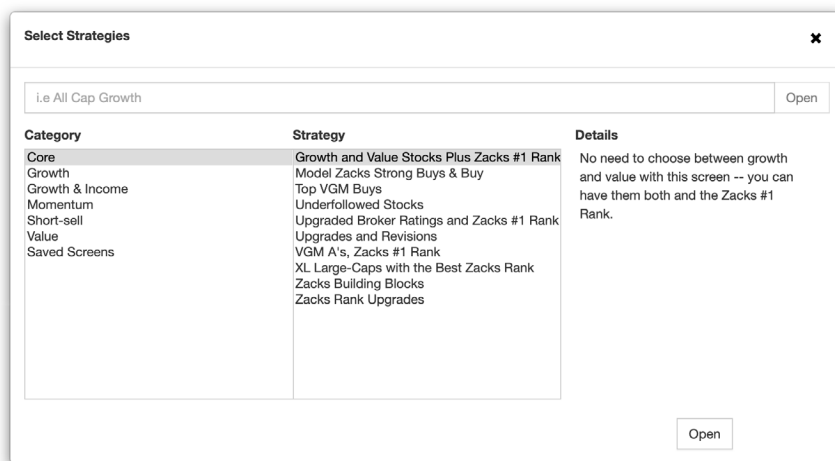
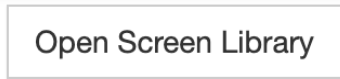
Advisor Tools provides easy to use screeners for Equities, Mutual Funds and ETFs. To begin the screening process, select **Screening** from the main Advisor Tools menu and then the desired screener type (Equity, ETF or Mutual Fund).



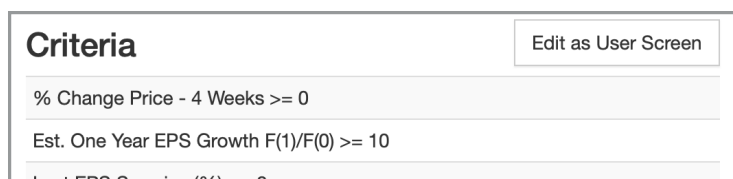
Using Zacks Predefined Screening Strategies

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.

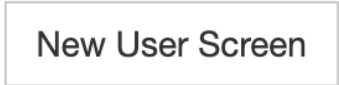


- » You can now select from the many predefined strategies included with your subscription. To view or run the criteria used for each strategy, simply click on the **Open** button from the Library view.
- » Edit the Zacks Strategy criteria by clicking the **Edit as User Screen** button.
 - > After saving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



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.

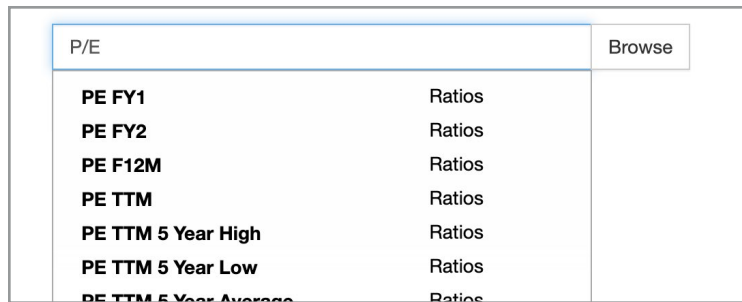


Step 1:

» 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.



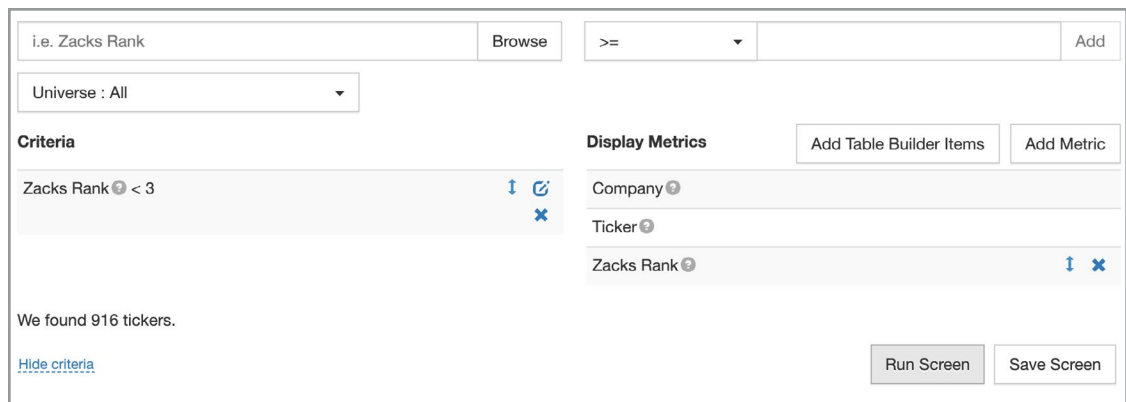
Step 2:

» Enter criteria for your selected item and click **Add**.



Step 3:

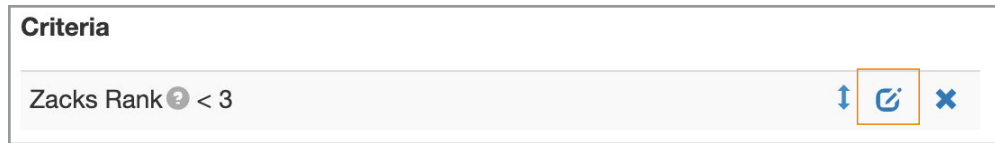
» After selecting all data items run the screen and view results by clicking the **Run Screen** button.



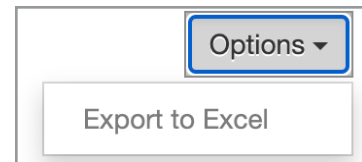
Editing a Screen

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.



- » **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.



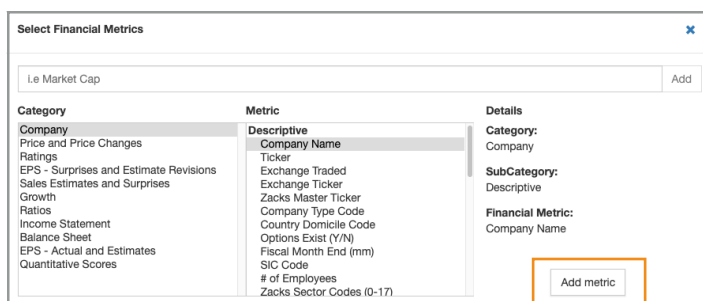
- > Click **Add Table Builder Items** or **Add Metric** and then select the items or saved table items to include as display only.
- > Run the screen again to view new results.

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.



Opening and Saving a Table

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

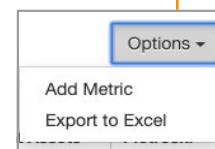
Stock Table Builder

Select action ▾ Test Display Tickers From: Equity watchlist: My Equity Watchlist ▾ Options ▾

| Symbol | PE TTM | Market Capitalization (\$mil) | Dividend Yield % | Long Term Debt/Common Equity | Sales Q0 TTM/Q-4 TTM | EPS Q-0/Q-4 | Beta vs Russell 2000 (60 months) | PE TTM 5 Year High | Surprise - Average EPS Surprise - Last 4 Quarters | Piotroski ROA signal | Total Current Assets Annual (\$Mil) | Piotroski Score |
|--------|--------|-------------------------------|------------------|------------------------------|----------------------|-------------|----------------------------------|--------------------|---|----------------------|-------------------------------------|-----------------|
| AAPL | 15.50 | \$926,356 | 1.55% | 0.79 | 9.38% | 7.46% | 0.82 | 20.64 | 3.47% | 1 | \$131,339 | 6 |
| MSFT | 27.03 | \$899,104 | 1.58% | 0.82 | 19.82% | 14.58% | 0.65 | 28.95 | 9.26% | 1 | \$169,662 | 9 |
| XOM | 16.13 | \$340,437 | 4.08% | 0.10 | 12.12% | 71.59% | 0.79 | 40.79 | 7.28% | 1 | \$47,973 | 9 |
| JNJ | 16.96 | \$372,118 | 2.60% | 0.46 | 6.71% | 13.22% | 0.37 | 19.72 | 1.61% | 1 | \$46,033 | 7 |
| GE | 15.09 | \$86,478 | 0.40% | 1.85 | -0.39% | -37.04% | 0.99 | 23.38 | 3.03% | 0 | \$121,917 | 4 |
| TMO | 24.18 | \$107,272 | 0.28% | 0.64 | 16.44% | 16.49% | 0.68 | 23.64 | 3.13% | 1 | \$10,625 | 7 |
| AMZN | 87.72 | \$867,316 | 0.00% | 0.54 | 30.93% | 179.63% | 1.23 | 963.48 | 88.81% | 1 | \$75,101 | 8 |
| NVDA | 29.92 | \$106,959 | 0.36% | 0.21 | 20.61% | -63.06% | 1.53 | 53.10 | 10.28% | 1 | \$10,557 | 7 |

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.

ZACKS 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.



(888) 691-0681



advisortools.zacks.com



advisortools@zacks.com

