

WATCH VIDEO ON HOW TO Isolating Data With Views



With over 2,000 data points per company, Stock Investor Pro offers a robust screening database. However, for analysis of individual companies, most users only focus on a select number of fields. While the various tabs on Stock Investor Pro allow you to view related data fields—growth rates, multiples, ratios, etc.—you can only do so for one company at a time. Our members frequently ask for an easy way to isolate specific data points that are critical to their personal investment research. With “views,” users can specify only those fields that interest them and view the data in a single table on the Stock Notebook. This issue of Stock Investor News walks you through the process of creating, applying, and editing views, as well as using them to generate reports and to export data.

A view is a collection of data points that can be applied to the “active set” of companies in the stock notebook to view on your computer screen. The companies encompassing the active set are those in the entire database when you first open the program. The active set can be the results of a screen, or you may open a saved portfolio and that will become your active set.

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