

Stock Screener Feature Checklist

www.stockscreening101.com

Screener Name: _____

Web Address: _____

Data location: ONLINE ____ DOWNLOADABLE ____

Must-have features

If you use a stock screener for your investing strategies, it must have the following:

Adequate data points and exchanges	Y	N
Adequate logic	Y	N
Save screen by name	Y	N
Exporting the screen results to a spreadsheet	Y	N
Date of most recent fundamental data	Y	N
	Y	N

Nice-to-have features

As you evaluate the screener, indicate if the feature is available:

Relative comparisons to sector, industry or benchmark	Y	N
Historical comparisons (Q over Q, Y over Y)	Y	N
Saving the screen results in a portfolio	Y	N
Restricting the number of results	Y	N
Ranking or percentile ranking	Y	N
View of data independent of the screening criteria	Y	N
Sorting the results by any viewable field	Y	N
Technical Analysis	Y	N
	Y	N

Advanced features

As you evaluate the screener, indicate if the feature is available:

Proprietary rating/ranking system	Y	N
Backtesting	Y	N
Custom formulas	Y	N
Importing a list of stock tickers	Y	N
Advanced logic	Y	N
Run screen against a custom basket of stocks	Y	N
	Y	N