

# Stock Screener Feature Checklist

[www.stockscreening101.com](http://www.stockscreening101.com)

Screener Name: \_\_\_\_\_

Web Address: \_\_\_\_\_

Data Provider: \_\_\_\_\_

Data location: ONLINE \_\_\_\_ DOWNLOADABLE \_\_\_\_

## ***Must-have features***

A stock screener for your investing strategies must have the following:

Adequate fundamental data	Y	N
Desired Markets and Exchanges	Y	N
Save screen criteria by name	Y	N
Historical snapshot of screen results	Y	N
Filing date of underlying company data	Y	N
Written documentation	Y	N
Sample (pre-built) screens	Y	N

## ***Nice-to-have and Advanced features***

Track screen performance	Y	N
Restrict number of passing companies	Y	N
Percentile ranking of criteria	Y	N
View of data independent of the screening criteria	Y	N
Sort results by any viewable field	Y	N
Weighted criteria	Y	N
Multi-factor ranking of results	Y	N
Technical Analysis	Y	N
Advanced logic	Y	N
Custom formulas	Y	N
Video support and webinars	Y	N
User forums	Y	N
Proprietary rating/ranking system	Y	N
Back-testing	Y	N
Custom universe	Y	N
Import a list of stock tickers	Y	N
Screen a custom universe or portfolio	Y	N
Automation and notification	Y	N
Direct connection to online broker	Y	N
Simulation	Y	N
	Y	N
	Y	N
	Y	N