## StockApp Guide

1. Create Account then Login. If you don't like typing your password you can tell StockApp to remember it. To forget it again uncheck the 'Remember me on this computer' to forget your credentials - <u>AND LOGIN TO CONFIRM!</u> Only then will it erase the credentials from the computer.



2. When you first login there are no stocks listed. You need to add some. By default this page only shows stocks with open trades. To see all the stocks you have added, click the 'Show All Stocks' checkbox.

				Ste	ockApp			Logout
Stocks	Details	Stats	MyStats	MyTrades	Feedback Info			@gmail.com
			Clear	Add	Show All Stocks			Legend
Row	Resource	Analyst	Symbol		Company Name	Last Price	Target Price	Note

3. Add some stocks. You may add many at once. Just put a space between each symbol. This is also the search box. It searches all fields for the letters typed.

Notice the 'Show All Stocks' auto selects and auto filters when adding new symbols.

Stocks	5 Details	Stats	MyStats	MyTrades	Feedback	Info	
META A	APPL MSFT GC	OG IBM	Clear	Add	Show All St	ocks	
Row	Resource	Analyst	Symbol		Company Nam	e	La

4. Double Click a row to edit the details.

			Clear	Add	Show All Stocks		
Row	Resource	Analyst	Symbol		Company Name	Last Price	Target Price
1			META	Meta Platform	ns Inc - Class A	169.1500	0.0000
2			MSFT	Microsoft Co	rporation	264.4300	0.0000
3			GOOG	Alphabet Inc	- Class C	111.7900	0.0000
4			IBM	International	Business Machines Corp.	129.2200	0.0000

5. Edit the details.



StocksDetailsStatsThis is the information It's where you put and your target pResourcePut a newletter nameAnalystThe actual personLast Price169.1500Target Price0.0000	MyStats Section. notes rice. here here here Description here here here Description here here None! 0. Rate 0. Pote	s the analyze section calculates the disc d on the target price section also include ends if there are an discounted! 0.0000 % Trailing Twelv 0.0000 % Dividends ( Rate ( ntial Loss! 0.0000 %	on. ount e. es y. ve Months 0.0000 0.0000 %	This is the repo section for all you in this sto It gives a general stock is working fo Open Positions Repo Shares My Cost Per Share Purchase Price	ort card ir positions ck. idea if this r you or not. rt Card 0.0000 0.0000 0.0000
Note a personal note   Save Cancel Delet   Snares Buy Date Buy F	e META Below is where you Only open trac rice Sell Date	u open, edit, close t des are calculated i Sell Price	trades for this sy	Dividends Received * uROI \$ * uROI \$ ymbol. d. Clear Add U	0.0000 0.00 0.000 %
Row Symbol Share	es Buy To Open Date	Buy To Open Price	Initial Cost	Net Cost	Sell To Close Date

6. Add trades. It recalculates on the server and reloads data.

Shares 1	Buy Date 2020-09-10	Buy Price 264.4300	Sell Date C Sell I	Price Trade Note Robinhood	Clear	Add Update Delete
Row	Symbol	Shares	Buy To Open Buy Date	y To Open Initial Cost Price	t Net Co	st Sell To Close Date
	Sell	Add To Close Date	Sell To Close Price	Days Held	eceived	ROI (\$)
Shares 5	Buy Date 2022-09-10	Buy Price 264.4300	Sell Date C Sell I	Price Trade Note Fidelity	Clear	Add Update Delete
Sell To Dat	Close Sell To Cl te Price	ose Days Held	Dividends Received	ROI (\$)	ROI (%)	Trade Note
		730	4.7200	4.7200	1.8174 %	Robinhood
MSF	T Microso	oft Corporati	on		Last Refresh	Time 2022-09-09 14:59:59
Resource Analys Last Price Target Price Note Save	e 264.4300 0.0000 Cancel	Delete MSFT	Amount     Declared     E       0.6200     2022-06-14     2       0.6200     2022-03-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2       0.6200     2021-02-14     2	Inted!     0.0000 %       Trailing Twelve Months       Dividends     2.4800       Rate     0.9379 %       Cofit     0.9379 %       Expate     Frequency     Payment       0022-08-17     quarterly     2022-09-08       0022-05-18     quarterly     2022-09-08       0022-02-16     quarterly     2022-03-10       0021-11-17     quarterly     2021-03-09       021-08-18     quarterly     2021-09-09       021-05-19     quarterly     2021-06-10	Open Posit My Cost Purc Est. Annual Est. Annual Dividends	tions Report Card   ?     Shares   6.0000     Per Share   264.4300     hase Price   1586.5800     I (current)   14.8800     Yield (ttm)   14.8800     s Received   4.72     * uROI \$   4.72     * uROI \$   0.2984 %     Cash Value   1586.5800
Shares	Buy Date E	Buy Price	Sell Date C Sell P	Price Trade Note	Clear	Add Update Delete
Sell To C Date	lose Sell To Clo Price	ose Days Held	Dividends Received	ROI (\$)	ROI (%)	Trade Note
		730	4.7200	4.7200	1.8174 %	Robinhood
		0	0.0000	0.0000	0.0000 %	Fidelity

7. Stats as provided by iexCloud.



8. My Stats shows how your doing for all your trades.

			The second line is a second line of	1220
Stocks	Details	Stats	My Stats	N



9. The MyTrades tab shows all your trades past and present (as long as you didn't delete them). You can also adjust the text size, column widths, and column order. To adjust column order just drag and drop it where you want by clicking on the name of the column and dragging to the location desired. The 'Row' column is always the first column. It cannot be moved.

S	stocks	Deta	ils	Stats	MySta	its N	ly Trades	Feedback	Info					
					Clo	ar	O Open							
	12. 14.				Cie	al	Open	Closed	O All				Le	gend
Row	Resource	Analyst	Symbol	Company Name	Last Price	Target Price	Note	Discounted or Overpriced	Discounted or Overpriced (%)	Dividend Regular Frequency	Dividend Regular Amount (\$)	Dividend Regular Annual (\$)	Dividend Regular Annual Yield (%)	Divide Amour
1			MSFT		264.4300	0.0000		Overpriced	100.0000 %	Quarterly	0.6200	2.4800	0.9379 %	2
2			MSFT		264.4300	0.0000		Overpriced	100.0000 %	Quarterly	0.6200	2.4800	0.9379 %	2
4														
					-									
		_												
	Ad	just t	ext	size usi	ng th	nis sli	ider		the state of the s					
<u></u>														

Max Text Size using the slider

oany ne	Note	Discounted or Overpriced (%)
sour	Healthcare	-7.9500 %
al Pr	<b>Cash Cow Dividends</b>	-40.5600 %
ris T	<b>Defense Contractor</b>	-14.1309 %
ect	DST - BDC rises with inter	-18.4783 %
t Co	<b>Corporate Debt Funds</b>	7.3388 %
∆rti	Stock Funde	-29 0600 %

10. Grid columns can be re-ordered and resized. StockApp will save your

Note	Discounted or Overpriced (%)	Dividend Regular Annual Yield (%)	Dividend Regular (%) TTM
•	-7.9500 %	1.2493 %	1.2493 %
Dividends	-40.5600 %	7.8062 %	7.6716 %
ontractor	-14.1309 %	1.8972 %	1.8125 %
rises with int	-18.4783 %	9.6000 %	7.2000 %
Debt Funds	7.3388 %	10.4255 %	20.7101 %
ds	-29.0600 %	10.1494 %	26.4996 %
riendly Divide	-13.1739 %	8.4126 %	6.3595 %
.8%), sws 14	-24.2444 %	4.1068 %	20.6219 %
div(1.8%)	-10.2773 %	1.7731 %	1.6782 %
all Funds	Il Funds -23.6271 %		15.5970 %
riendly Divide	7.2422 %	4.2811 %	10.2034 %
rogen	rogen 17.1405 %		No Dividends!

settings on the server. Here I have hidden several by just setting the widths really small.

11. While adjusting columns the server will wait just for a bit before saving. You will see these banners.

## Getting ready to save ...

## Saving grid settings ...

12. The feedback page allows you to send feed back directly to me.

Stocks	Details	Stats	MyStats	MyTrades	Feedback	Info
	F	eedba	ick For	m		
S	ubject					
			(	Characters left:	500	
			Submit			

13. Info shows a few items about calculations and data sources.

Slocks Details Stats WyStats WyTrades P	reedback
The percentage formula for Return On Investment (ROI) is Final Price + Dividends Received - Initial Cost ROI =	Release Notes: - Stock data is provided by iexCloud, Investors Exchange. - Delayed Data - Check with your broker for the latest information and investment advice. If you find a bug, send me feedback on how to replicate the issue, and I'll look into it. Thank you for using StockApp! Ben