

Feature Comparison	CoreSSG™ and Core Tools	SSGPlus™ and Plus Tools
Supported Platforms	Win, Mac, iOS, Android devices using Edge, Chrome, Firefox, Safari browsers running on desktops, laptops, tablets and smart phones	
Stock Selection Guide® (SSG®)	Yes - CoreSSG app	Yes - CoreSSG & SSGPlus app
SSG Workflow	Step-by-Step	2-Page SSG
Peer Comparison	Yes - 8 Data Items	Yes - 9 Data Items
10 Years Integrated Stock Data	Yes	Yes
PERT-A (Quarterly Data)	No	Yes – 10 years - Data and Graph
Max Saved Studies	50	1000
Visual Analysis (Graphs)	12 Data Items	21 Data Items
Movable Graph Lines	No	Yes
Bank Analysis Data - Assets, ROA	No	Yes
Funds from Operations Data – REITs	Yes	Yes
Preliminary/Final Data Indicator	Yes	Yes
Preferred Procedure Calculator	No	Yes
Growth Trend Data for EPS, Sales	No	Yes
Research Links by Ticker	Yes	Yes
Outlier Selection	By Year	By Individual Cell
Management/Quality Trend Indicator	No	Graph and Text
Save/Create Notes with Study	Yes	Yes
Community/Staff Notes	Yes	Yes
Judgment Audit	Yes	Yes
Low Price Options	3 options	5 options
Share Studies Online	Yes	Yes
Member Sentiment Estimates	Yes	Yes
Detailed 1,2,3 Yr Estimates	No	Yes
Import Studies from OLT/TK	Yes	Yes
Lock Data	Yes – By Row	Yes – By Row
Automatic Ticker/Name Updates	Yes	Yes
Phone/Tablet Usage	Yes	Yes

Feature Comparison – Pg 2	CoreSSG™ and Core Tools	SSGPlus™ and Plus Tools
Portfolios	Yes - 1 Report	Yes - 4 Reports
Summary Report	Yes	Yes
PERT Report	No	Yes
Diversification Reports	No	Yes - 2
Trend, Offense, Defense Reports	No	No
Challenge Function	No	No
Stock Ideas	Yes	Yes
Pre-Defined Screens	2	6
Total Screening Criteria	5	13
Graph Preview of Stock Data	Yes	Yes
Morningstar Grades in Criteria	No	Yes
Ticker Heat Map	No	Yes
Save to Filtered List of Ideas	Yes	Yes
Stock Comparison Guide	Yes - SCGCore View	Yes - SCGCore & SCGPlus View
Comparison Items	25 data items	46 data items incl bank metrics
Compare to Industry Averages	Yes	Yes
Ability to Save Comparisons	Yes	Yes
Graph Data for Compared Companies	Yes	Yes
Individual Cell Highlights	Yes	Yes
Compare Without Saved Study	Yes	Yes
Share Comparison Guide Online	Yes	Yes
Help & Support	Yes	Yes
Quick Start Guides	Yes	Yes
Product Manual	No	No
Live Webinars	Yes	Yes
Recorded videos	Yes	Yes
Free Telephone & Email support	Yes	Yes
FAQ site	Yes	Yes
User feature request forum	Yes	Yes
Pricing	\$120/year	\$145/year
	(Includes NAIC membership and Benefits)	(Includes NAIC membership and Benefits)
	Club members paying \$45 can upgrade for \$60/year	Club members paying \$45 can upgrade for \$85/year
Revised: 8-22-2024	Existing individual members receive a loyalty discount of \$15/year	Existing individual members receive a loyalty discount of \$15/year