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Back to Basics
Oklahoma Chapter EduFest 2023



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TOOLS FOR THE SSG® CORESSG & SSGPLUS

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Today's Session:

1. Review the CoreSSG
2. Differences between the CoreSSG and SSGPlus
3. Review the SSGPlus tool and features

CoreSSG Quick Start Guide

CORESSG CoreSSG Quick Start Guide

What Is the Stock Selection Guide?

The Stock Selection Guide (SSG) is BetterInvesting's primary stock analysis tool, which organizes a company's historical financial data to help investors identify the characteristics of quality growth companies and to enable plotting of potential future growth from historical trends. The SSG also organizes historical price and P/E data to help an investor determine a reasonable price to pay for the stock.

The online CoreSSG tool presents the core concepts and conservative guidelines of the Stock Selection Guide methodology in an easy-to-use, step-by-step format for the new investor.

1 How to Access

To open a new study, enter a ticker into the box on the member home page, pick from the list and click GO

2 How to Open a New Study, Open a Saved Study

Click on the My Studies icon to open the Portfolios and Studies page.

Enter a new ticker and click on New Study.

Mouse over an existing study and click to open.

| Actions | Company | Ticker | Name | Created | Date Created | Date Modified | Sector |
|---------|--------------------|--------|------------------|---------|----------------------|-----------------------|------------|
| | Intel | INTU | INTU 42419 BINC | | 4/24/2019 8:41:51 AM | 5/17/2019 6:04:44 PM | Technology |
| | Paycom Software | PAYC | PAYC 42419 BINC | | 4/24/2019 9:29:16 AM | 5/17/2019 9:52:51 PM | Technology |
| | Arise | ARISE | ARISE 42419 BINC | | 4/24/2019 9:29:53 AM | 5/17/2019 7:21:23 PM | Technology |
| | Red Hat | RHT | RHT 42419 BINC | | 4/24/2019 9:29:36 AM | 5/17/2019 11:52:05 AM | Non-Lang |
| | Cadence Design Sys | CDNS | CDNS 42419 BINC | | 4/24/2019 9:36:55 AM | 5/17/2019 11:53:55 AM | Technology |
| | Adobe | ADBE | ADBE 42419 BINC | | 4/24/2019 9:38:57 AM | 5/17/2019 11:40:59 AM | Technology |
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| | Avision Technology | ADPN | ADPN 42419 BINC | | 4/24/2019 9:40:26 AM | 5/17/2019 10:50:11 AM | Technology |
| | AppFolio | APPT | APPT 42419 BINC | | 4/24/2019 9:41:29 AM | 5/17/2019 10:50:11 AM | Technology |
| | Deere & Co | DE | DE 42419 BINC | | 4/24/2019 9:38:40 AM | 5/17/2019 10:50:11 AM | Technology |

CORESSG QUICK START GUIDE (1/20) PAGE 1

- Step-by-step guide to navigating the CoreSSG stock selection tool
- Basic CoreSSG functionality in sixteen easy steps
- Available on the Help & Information Tab



Member Home Tools Access



HOME

WELCOME TO BETTERINVESTING

LEARNING CENTER

FIND GREAT STOCKS

ONLINE TOOLS

INVESTMENT CLUBS

OUR COMMUNITY

Online Tools

Learn about our online stock selection tools.

GET STARTED



ONLINE TOOLS



LEARNING CENTER



MEMBER BENEFITS



INVESTMENT CLUBS

Online Tools

Launch SSG - Enter Ticker Here

GO



SCG

My Studies

CR

Don't have access? Free, limited trial version

?

Most Active Stocks

The top 10 companies our members are investing in (ranked by combined buys and sells) are:

1. Amazon.com (AMZN)

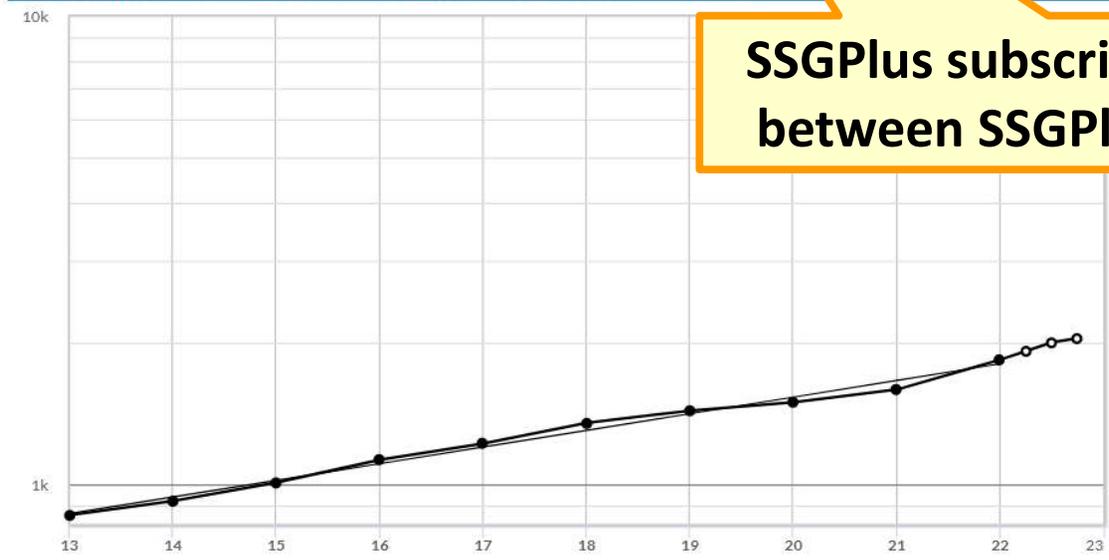
Buy/Sell

172-27

First Cut Stock Reports

Every week, members from across the country share new stock studies.





SSGPlus subscribers may switch between SSGPlus and CoreSSG

It is desirable to invest in companies whose sales growth is strong and consistent and generally growing faster than the overall market.

LEGEND

- FDS
- XTO
- MSCI
- COIN
- Industry Average
- Peer Group Average

Change Peers

| Company | Ticker | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Growth Rate (%) |
|----------------------|--------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------|
| FactSet Research Sys | FDS | 858 | 920 | 1,007 | 1,127 | 1,221 | 1,350 | 1,435 | 1,494 | 1,591 | 1,844 | 8.5% |

| Company | Ticker | Latest Quarter | Year Ago Quarter | % Change |
|----------------------|--------|----------------|------------------|----------|
| FactSet Research Sys | FDS | 530 (05/23) | 489 (05/22) | 8.4% |

Menu

Navigation

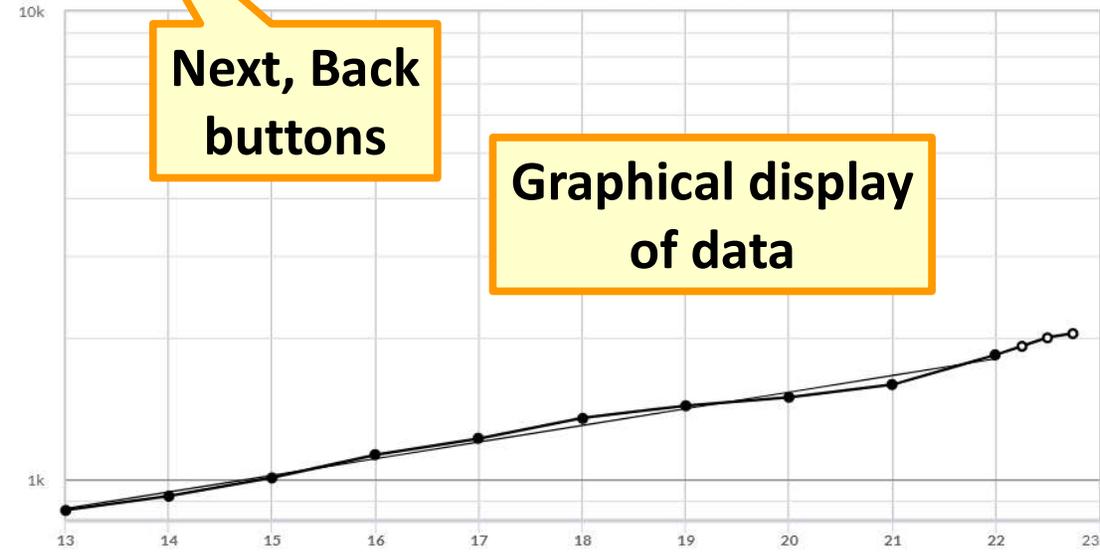
BETTERINVESTING
CORE SSG

File Data Print Research Tools Logout

Analyze Growth Evaluate Management Forecast Sales/Earnings Assess Risk and Reward Determine 5 Year Potential Audit Sentiment Notes: 2

← Back Next → Step 1: Historical Sales Step 2: Historical Earnings Per Share Step 3: Historical Stock Price Review

Company: FactSet Research Sys (FDS) Study Name: FDS 8/4/23 EduFest 2023 Quick Navigation



Next, Back buttons

Graphical display of data

SSG Basics

EDUCATION
Historical sales growth is the first of four indicators BetterInvesting uses to identify well managed companies. Those with strong sales growth is strong and consistent and generally growing faster than the overall market.

LEGEND

- FDS
- XTO
- MSCI
- COIN
- Industry Average
- Peer Group Average

Change Peers

Legend

- SSG
- SCG
- ?

Tabs

Tabular display of data

| Historical Sales (Millions) | | | | | | | | |
|-----------------------------|-------|-------|-------|-------|-------|-------|-------|-----------------|
| Company | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Growth Rate (%) |
| FactSet Research Sys | 1,127 | 1,221 | 1,350 | 1,435 | 1,494 | 1,591 | 1,844 | 8.5% |

| Recent Quarters (Millions) | | | | |
|----------------------------|--------|----------------|------------------|----------|
| Company | Ticker | Latest Quarter | Year Ago Quarter | % Change |
| FactSet Research Sys | FDS | 530 (05/23) | 489 (05/22) | 8.4% |

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CORESSG

Help and Information

Help

Please review the following resources to find out more about the Online Tools. If you have further problems or questions about these applications or the Online Tools, please contact our Customer Support team at service@betterinvesting.org.

Tutorials - archived webinar recordings of 60-80 minutes each

- Basic Usage of the CoreSSG Stock Selection Guide Application
- Basic Usage of the SSGPlus Stock Selection Guide Application
- Basic Usage of the Stock Comparison Guide (SCG) Application
- Easy Research Using the Stock Selection Guide
- Screening and Stock Ideas
- What's New in Tools - CoreSSG and SSGPlus
- Portfolio Reports in SSGPlus

Quick Start Guides - short documents that explain just the basics

- CoreSSG Quick Start Guide (PDF)
- SSGPlus Quick Start Guide (PDF)
- Screening & Stock Ideas Quick Start Guide (PDF)
- Portfolio Quick Start Guide (PDF)
- Using the Portfolio Summary Report (PDF)

Reference Materials

- Comparison Chart - CoreSSG & SSGPlus (PDF)
- SSG Guidelines for Beginners (PDF)
- SSG Calculation Reference (PDF)
- Glossary of Investing and Online Tools Terms (PDF)
- Stock Analysis Tools Frequently Asked Questions (Help Center)
- User Feature Request Forum: feedback.betterinvesting.org

More information on BetterInvesting's Stock Selection Guide Methodology:

The Introduction to the Stock Selection Guide Series of webinars is an included membership benefit. These classes are located in the Video Learning Library.

Online Tools Tutorial Webinars

Quick Start Guides

Reference Materials

FAQs and Feature Requests

Video Learning Library



| Key Features | CORE SSG | SSG ^{PLUS} |
|--------------------------|--|--|
| Supported OS's | Win, Mac, iOS, Android | Win, Mac, iOS, Android |
| Supported Devices | Computer, mobile devices | Computer, mobile devices |
| Application delivery | Cloud (online) | Cloud (online) |
| Workflow | Step-by-Step | 2 Page SSG |
| Graphs | 11 data items | 21 data items |
| Peer Comparison | Yes | Yes |
| Bank Analysis Features | No | Yes |
| Integrated Stock Data | Yes | Yes |
| Ticker Heat Map | No | Yes |
| Portfolios | Yes – 1 report | Yes – 4 reports |
| Quarterly Data (PERT-A) | No | Yes – data & graph |
| Pre-Defined Screens | 2 | 5 |
| Total Screening Criteria | 5 | 13 |
| Stock Comparison Guide | Yes – with graphs | Yes – with graphs |
| Pricing | \$120/year (includes BI membership, data & benefits) | \$145/year (includes BI membership, data & benefits) |

Remember...

- Same SSG
Methodology
- SAME RESULTS

SSGPlus Quick Start Guide

SSG^{PLUS}
SSGPlus Quick Start Guide

Are you ready for SSGPlus?

The online SSGPlus tool provides a two-page view of the Stock Selection Guide for the more experienced user.

Users already familiar with Stock Selection Guide concepts and who complete SSG studies on a regular basis find that the condensed format of the SSGPlus is easy and efficient to navigate.

The SSGPlus tool also offers in-depth research opportunities by providing additional graphs of fundamental annual data, quarterly data analysis and more portfolio reports.

Regardless of the SSG tool used, the methodology and the results are the same.

1 How to Access

To open a new study, enter a ticker into the box on the member home page, pick from the list and click **GO**



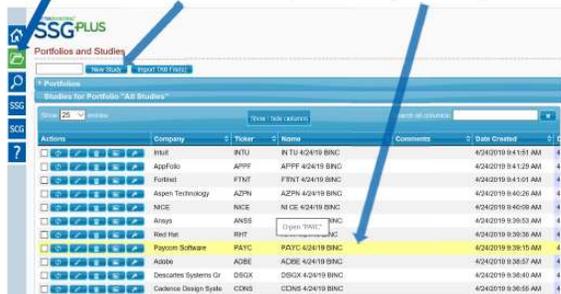
-OR- Click on **My Studies** to go to your library of saved studies.

2 How to Open a New Study, Open a Saved Study

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| | Intel | INTU | INTU 4/24/19 BINC | | 4/24/2019 9:41:51 AM |
| | AppFolio | APFF | APFF 4/24/19 BINC | | 4/24/2019 9:41:29 AM |
| | FairPoint | FPNT | FPNT 4/24/19 BINC | | 4/24/2019 9:41:01 AM |
| | Aspen Technology | AZPN | AZPN 4/24/19 BINC | | 4/24/2019 9:40:26 AM |
| | NICE | NICE | NICE 4/24/19 BINC | | 4/24/2019 9:40:09 AM |
| | Alnyx | ANXS | ANXS 4/24/19 BINC | | 4/24/2019 9:39:53 AM |
| | Red Hat | RHT | RHT 4/24/19 BINC | | 4/24/2019 9:39:26 AM |
| | Paycom Software | PAYC | PAYC 4/24/19 BINC | | 4/24/2019 9:39:15 AM |
| | Ardor | ADRE | ADRE 4/24/19 BINC | | 4/24/2019 9:38:57 AM |
| | Descartes Systems Gr | DSGX | DSGX 4/24/19 BINC | | 4/24/2019 9:38:40 AM |
| | Cadence Design Syst | CDNS | CDNS 4/24/19 BINC | | 4/24/2019 9:38:55 AM |

- Eight Easy Steps to Basic SSGPlus Functionality
- Available on the Help & Information Tab

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SSG PLUS

Navigation

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SSG

SCG



Tabs

Analyze Growth and Quality

Valuation and Return

Quarterly Data

Ratings

Alert

Segment

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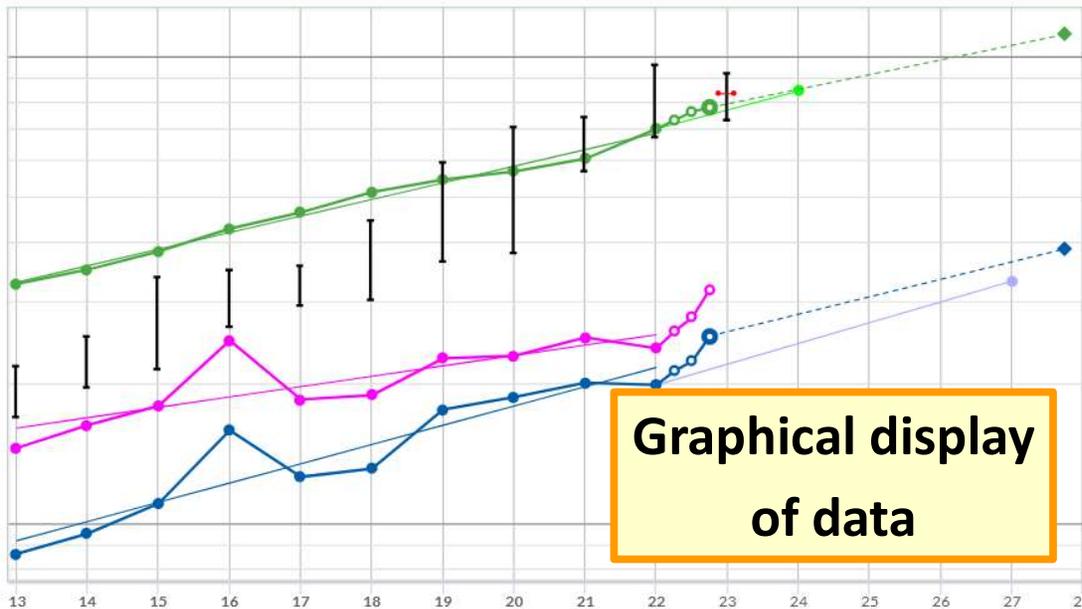
5

6

7

Company: FactSet Research Sys (FDS) Study Name: FDS 8/4/23 EduFest 2023

Quick Navigation



Graphical display of data

PROJECTION STARTING POINT

Annual Quarter Trend

RECENT QUARTERLY FIGURES

FY2023 Quarter Ending (05/23)

| | Sales | EPS |
|-------------------|-------|-------|
| Latest Quarter | 530 | 3.46 |
| Year Ago Quarter | 489 | 1.93 |
| Percentage Change | 8.4% | 79.3% |

ANALYST CONSENSUS ESTIMATES

Sales 2 Year Estimate: 9.8%
EPS Long Term Estimate: 10.0%

LEGEND

- Sales
- Pre-Tax Profit
- Prices Hi/Lo
- EPS
- Book Value/Share
- Free Cash Flow/Share
- Dividend
- Income
- Shares Outstanding
- Sales Detailed Estimates
- EPS Detailed Estimates

Legend

Peers

Reset Chart

Compare Peers

Fundamental Company Data

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Growth (%) | Forecast (%) | 5 Yr Est |
|------------------------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|------------|--------------|----------|
| Historical Sales (\$M) | 858 | 920 | 1,007 | 1,094 | 1,181 | 1,268 | 1,355 | 1,442 | 1,529 | 1,616 | 8.5% | 7.5 | 2,942 |
| Historical EPS (\$) | 4.45 | 4.92 | 5.71 | 6.50 | 7.29 | 8.08 | 8.87 | 9.66 | 10.36 | 10.25 | 10.0% | 9 | 20.08 |
| Pre-Tax Profit (\$M) | 271 | 303 | 334 | 365 | 396 | 427 | 458 | 489 | 520 | 551 | 5.3% | | |

Tabular display of data



Question and Comments

CoreSSG and SSGPlus Tools



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