

PERT Report Data & Calculation Reference – Page 1

Updated: October 22, 2024

This reference sheet explains the column data and calculations used in the BetterInvesting PERT Report. Use CTRL-F (Windows) or ⌘-F (Mac) to search the document.

Column Name	Category	Definition	Alert Indicator
Company Name	General	Company name from SSG	n/a
Div	General	Indicated annual dividend from SSG	n/a
% Yield	General	(Indicated annual dividend / Current price on SSG) * 100	n/a
Est EPS Nxt 12 Mo	General	TTM EPS * (1+ Forecast EPS Growth Rate from SSG)	n/a
Qtr End	Quality	Month/year of reported quarter. 2 rows in this box. One for the most recent quarter on the SSG, and one for the quarter one year ago.	n/a
EPS \$	Quality	EPS earned in the identified quarter. 2 rows in this box. One for the most recent quarter on the SSG, and one for the quarter one year ago.	n/a
EPS % Chg	Quality	EPS quarterly % change. ((EPS \$ for most recent quarter/EPS \$ for the year ago quarter) – 1) * 100 Calculation is not made if the older quarter is a negative value.	Shaded pink if EPS % Chg is less than the forecast EPS growth rate on the SSG.
Sales Mill \$	Quality	Sales in the identified quarter. 2 rows in this box. One for the most recent quarter on the SSG, and one for the quarter one year ago.	n/a
Sales % Chg	Quality	Sales quarterly % change. ((Sales Mill \$ for most recent quarter/Sales Mill \$ for the year ago quarter) – 1) * 100	Shaded pink if Sales % Chg is less than the forecast Sales growth rate on the SSG.
Pre-Tax Profit Mill \$	Quality	Pre-Tax Profit in the identified quarter. 2 rows in this box. One for the most recent quarter on the SSG, and one for the quarter one year ago.	n/a
Pre-Tax Profit % Chg	Quality	Pre-Tax Profit quarterly % change. ((Pre-Tax Profit Mill \$ for most recent quarter/Pre-Tax Profit Mill \$ for the year ago quarter) – 1) * 100	Shaded pink if Pre-Tax Profit % Chg is less than the forecast EPS growth rate on the SSG.
Pre-Tax Profit % Sales	Quality	Pre-Tax Profit margin in the identified quarter. 2 rows in this box. One for the most recent quarter on the SSG, and one for the quarter one year ago. Calculation: (Pre-Tax Profit Mill \$ / Sales Mill \$) * 100	n/a
TTM EPS \$	Quality	EPS earned in the 4 quarters ending with the identified quarter. 2 rows in this box. One for the most recent quarter on the SSG, and one for the quarter one year ago.	n/a

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Column Name	Category	Definition	Alert Indicator
TTM EPS % Chg	Quality	TTM EPS % change. ((TTM EPS \$ for most recent quarter/TTM EPS \$ for the year ago quarter) – 1) *100	Highlighted pink if TTM EPS % Chg is less than the forecast EPS growth rate on the SSG.
Proj PE	Value	Projected P/E = Current Stock Price/ Est EPS Nxt 12 Mo	n/a
Price	Value	Current Stock Price as shown on the SSG. Second line displays the Price Date from the SSG.	Price date is RED if more than 7 days old.
Proj RV	Value	Projected Relative Value = (Proj PE / Average PE (Projected))*100	Highlighted yellow if the value is less than 80 or more than 150.
Proj 5Yr P/E Ratios Hi	Value	Forecast High P/E from the SSG	n/a
Proj 5Yr P/E Ratios Avg	Value	Average of the forecast high P/E and Low P/E = (Proj 5Yr P/E Ratios Hi + Proj 5Yr P/E Ratios Low) / 2	n/a
Proj 5Yr P/E Ratios Low	Value	Forecast Low P/E from the SSG	n/a
Est EPS Growth	General	Forecast EPS Growth rate from the SSG	n/a
PEG Ratio	Value	Price-to-EPS-growth ratio = Proj PE / Est EPS Growth	n/a
U/D Ratio	Value	Upside Downside Ratio from the SSG	Highlighted yellow if the value is less than 1.
% Total Return	Value	Compound Annual Return – Using Forecast High P/E from SSG	Highlighted yellow if the value is less than 10%
Est 5 Years – Low Price	Value	Forecasted Low Price from the SSG	n/a
Est 5 Years – High Price	Value	Forecasted High Price from the SSG	n/a