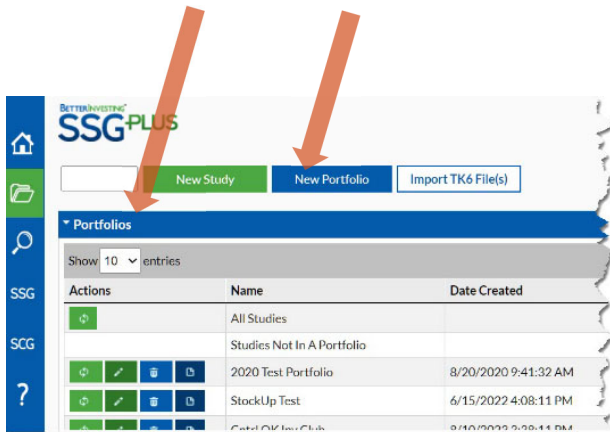




Portfolio Quick Start Guide

1 How to Add a Portfolio

Select the **Portfolio** bar to expand the portfolio list and select '**New Portfolio**'.



Create Portfolio

Name: My Club Watchlist

Account Name:

Description: This is a list of stocks my club is evaluating for purchase.

Public: ☐

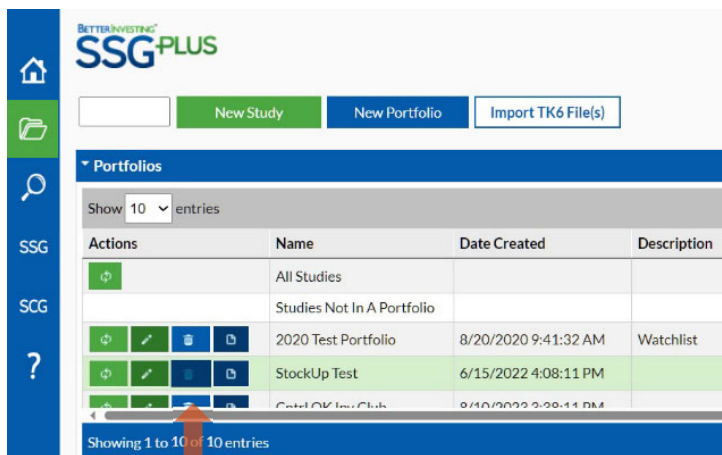
Portfolio:

Url:

Save Cancel

Name your portfolio, fill in Account Name (optional) and Description (optional) and select '**Save**'

2 How to Delete a Portfolio



Mouse over and select the **Trash Can** icon next to the portfolio to delete.

Confirm Delete

Delete portfolio: "StockUp Test"?

NOTE: Any studies belonging to this portfolio will not be deleted.

OK Cancel

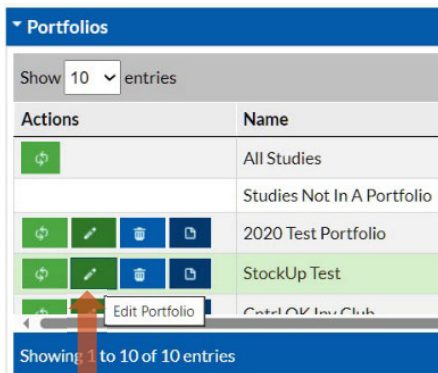
Select '**OK**' to confirm. Only the portfolio name is deleted. The SSG studies are still in your account and are not deleted.



Portfolio Quick Start Guide

3

How to Add a Study to a Portfolio and Add Shares



Select the **Pencil** icon.

Ticker	Name	Date	Shares
FIVE	FIVE 12/11/23:: 12/11/2023		

Enter the **ticker** of your study and pick the correct study from your study list or enter **\$CASH** to enter cash.

Ticker	Name	Date	Shares
FIVE	FIVE 12/11/23	12/11/2023	10

Enter the number of shares (optional) and select the **Check** icon to accept your changes.

Repeat for all company studies in the portfolio. Select **'Save'** to save your changes.

4

How to Select a Portfolio and Edit the Number of Shares

Actions	Name	Date Created	Descrip
[Pencil]	2020 Test Portfolio	8/20/2020 9:41:32 AM	Watchli
[Pencil]	StockUp Test	6/15/2022 4:08:11 PM	
[Pencil]	Catal OK for Club	8/10/2022 2:29:11 PM	

Actions	Company	Ticker	Name	Comme
[Pencil]	Jack Henry & Associa	JKHY	JKHY 8/19/20 PT	
[Pencil]	RBC Bearings	RBC	ROLL 8/19/20 PT	112520
[Pencil]	Mastercard	MAST	MAST 8/19/20 PT	112520

Mouse over and select the **Pencil** icon.

Select the portfolio by selecting the row. The study list below will change to show only studies in the portfolio.

Ticker: JKHY
Study Name: JKHY 8/19/20 PT
Comments:
Shares: 100

Save **Cancel**

Edit the Share value and select **'Save'**.



Portfolio Quick Start Guide

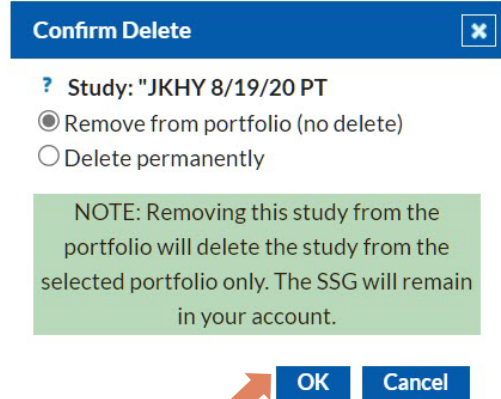
5 How to Delete a Study from a Portfolio

IMPORTANT: Make sure you have first selected the correct portfolio.



Studies for Portfolio "2020 Test Portfolio"				
Show 100 entries				
☐	Actions	Company	Ticker	Name
☐		Jack Henry & Associa	JKHY	JKHY 8/1
☐		RBC Bearings	RBC	ROLL 8/1

Mouse over and select the **Trash Can Icon** next to the study to delete.



Confirm Delete ✕

? Study: "JKHY 8/19/20 PT"

☒ Remove from portfolio (no delete)

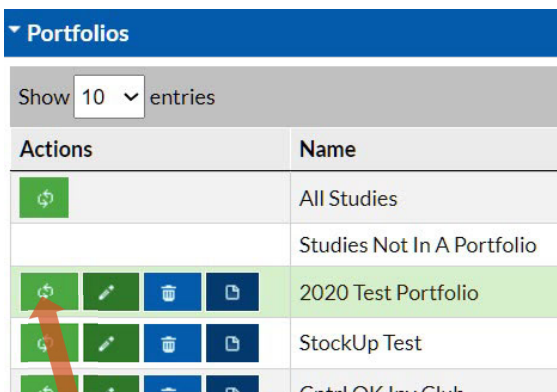
☐ Delete permanently

NOTE: Removing this study from the portfolio will delete the study from the selected portfolio only. The SSG will remain in your account.

OK **Cancel**

Select '**OK**' to confirm. By default the study is just removed from the portfolio and not deleted permanently.

6 How to Update Data in a Portfolio



Portfolios	
Show 10 entries	
Actions	Name
	All Studies
	Studies Not In A Portfolio
	2020 Test Portfolio
	StockUp Test
	Catrol OK Inc Club

Mouse over and select the **Refresh Icon** next to the portfolio to update.



Get Latest Company Data for Portfolio "2020 Test Portfolio" ✕

☒ Update data and prices

☐ Update prices only

OK **Cancel**

Choose to update all financial data and prices or update prices only. Select '**OK**' to confirm.



Portfolio Quick Start Guide

7 How to Run a Portfolio Report

Mouse over and select the **Reports** icon.

Actions	Name	Date Created
	All Studies	
	Studies Not In A Portfolio	
	2020 Test Portfolio	8/20/2020 9:41:32 AM
	StockUp Test	6/15/2022 4:08:11 PM

Select the appropriate button to select **Summary**, **PERT** or **Diversification** report (SSGPlus required for PERT and Diversification).

Report Options											
Summary PERT Diversification											
Report Details											
Show All entries											
©Total Return Proj Avg Return											
Portfolio Total Value \$4,672.49											
Portfolio dollar-weighted average US/DS: 3.2											
%Total Return: 13.1											
Ticker	Company	Price Date	Price	Shares	Total Value	% of Portfolio	Current PE	Buy Below	Sell Above	US/DS	% Tot Ret
ADBE	Adobe	6/14/2022	370.82	1.0	370.82	7.9	36.8	463.00	768.70	9.1	20.0
CMCSA	Comcast	6/14/2022	39.84	1.0	39.84	0.9	12.9	47.20	73.40	8.1	18.4
COST	Costco Wholesale	6/14/2022	454.80	1.0	454.80	9.7	35.8	404.10	587.50	1.6	9.2

Select the PDF symbol to open the report in PDF format.

8 Report Options

Select the **Sort** icon to sort the column.

Company Name	Div	% Yield	Est EPS Nxt 12 Mo	EPS		Sales		Pre-Tax Profit			TTM EPS		Proj PE	Price	Proj RV
				Qtr End	\$	% Chg	Mill \$	% Chg	Mill \$	% Chg	% Sales	\$	% Chg		
Halozyne Therapeutic	0.00	0.0	2.35	09/23 09/22	0.61 0.44	38.6% 0.44	216.0 209.0	3.4% 0.44	101.8 73.7	38.1% 0.44	47.1% 35.3%	1.88 1.49	26.2% 0.44	17.1	40.14 12/7/2023
Shoals Technologies	0.00	0.0	0.98	09/23 09/22	-0.06 0.07	-- 0.07	134.2 90.8	47.8% 0.07	-16.5 15.2	-208.3% 0.07	-12.3% 16.7%	0.85 0.11	652.2% 0.11	13.9	13.61 12/7/2023

Select the row to open the study.

- Red 'price date' text indicates the price data is > 7 days old.
- Dashed lines in a cell indicate the study is not completed with all judgments.
- Pink highlighting on the PERT report indicates that the latest quarter change is not meeting your projections.
- PERT report field 'Proj RV' is highlighted in yellow if the value is < 80 or > 150
- PERT report field 'U/D Ratio' is highlighted in yellow if the value is < 1
- PERT report field '% Total Return' is highlighted in yellow if the value is < 10%