



Quick Start Guide 2019

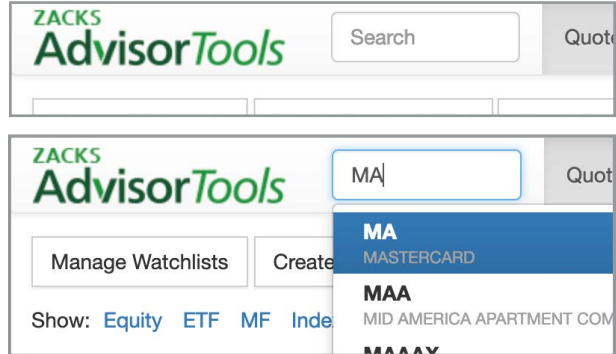
Table of Contents

Getting Started	3
Search for Equities, Mutual Funds and ETF data	3
View information about current holdings, indices and economic series	3
Start idea generation with Zacks Research from the Advisor Tools main menu	3
Equity Select Lists	5
ETF Model Portfolios	5
Market Strategy Reports	6
Quote Monitor Setup	7
Manually enter ticker symbols to a New Watchlist	7
Batch load ticker symbols to a new Watchlist	7
Make changes to an existing Watchlist	8
Customize Watchlist Mini Chart	8
Equity, Mutual Fund & ETF Detailed Views	9
Charting	13
Fundamental Charts	13
Performance Charts	15
Technical Charts	16
Screening Equities, Mutual Funds and ETFs	17
Using Zacks Predefined Screens	17
Creating a New Screen	18
Stock, ETF and Mutual Fund Table Builders	19
Building a Table	19
Opening and Saving a Table	19
Exporting a Table	19
Customer Support	20

Getting Started

Search for Equities, Mutual Funds and ETF data

Access the detailed Equity and Fund views by entering a known ticker symbol in the **Search** area, or start typing a ticker or name and have Intellisense provide a list of matching options.



View information about current holdings, indices and economic series

Utilize the Quote Monitor feature to view daily performance data and additional tabs that provide quick access to vital asset-specific information such as research, news and events.

My Equity Watchlist EQUITY Updated 10:05 Options ▾

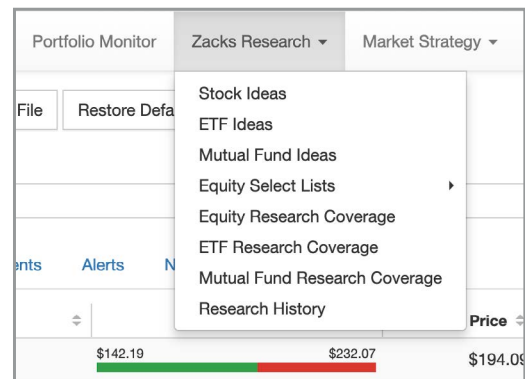
Overview **Zacks Research** Quant Models Data Events News

Symbol	Name	52 Week Close Range	Price	Change	%Chg	Zacks Rank
AAPL	Apple Inc	\$90.52 - \$156.10	\$150.88	-\$4.59	-2.95%	3
XOM	Exxon Mobil Crp	\$80.49 - \$95.12	\$82.22	-\$0.33	-0.40%	3
INTL	International	\$110.99 - \$128.96	\$127.42	-\$0.84	-0.66%	3


Start idea generation with Zacks Research from the Advisor Tools main menu

Stock, ETF and Mutual Fund Idea views include:

- » Bull & Bear stocks of the day
- » Market analysis & outlook
- » Stock picking strategies & commentary



Equity, ETF and Mutual Fund Research

- » Multiple report types are available including Detailed Analysts, Quantitative Snapshot & Digest.
- » Click on the individual icons for Report and Snapshot to see reports.
- » Filter views by clicking on any of the listed item titles.
- » Want more info about the coverage? Click the get information icon 

Equity Research Coverage 										
Number of Companies: 1197 										
Company	Ticker	Sector	Industry	Last Close Price	Market Cap (\$M)	Dividend Yield	Zacks Rank	Report	Snapshot	
Abercrombie	ANF	Consumer discr	Retail -- Apparel / Shoe	\$26.81	\$1,766	2.98%	1			
Ametek Inc	AME	Industrials	Electrical -- Test Equipment	\$82.23	\$18,709	0.68%	1			
Antero Resource	AR	Energy	Oil -- Us Exploration & Production	\$8.65	\$2,673		1			



Not finding a research feature?

Some of the research resources and tools discussed in this section are not available in all versions of Advisor Tools.

To unlock these features, contact your Zacks representative or email advisorstools@zacks.com.

Research History: Detailed Research reports for Equities & Specific Industries

- » Enter a ticker in the Ticker(s) input area. Enter multiple tickers separated by a comma to retrieve research for multiple companies.


Ticker(s): <input type="text" value="Lookup"/>	Categories: <input type="text" value="All Reports"/>	Brokers: <input type="text" value="All Brokers"/>
Date: <input type="text" value="Last 30 Days"/>	Industries: <input type="text" value="All Industries"/>	<input type="button" value="Search"/>
		<input type="button" value="Reset"/> <input type="button" value="Clear"/>

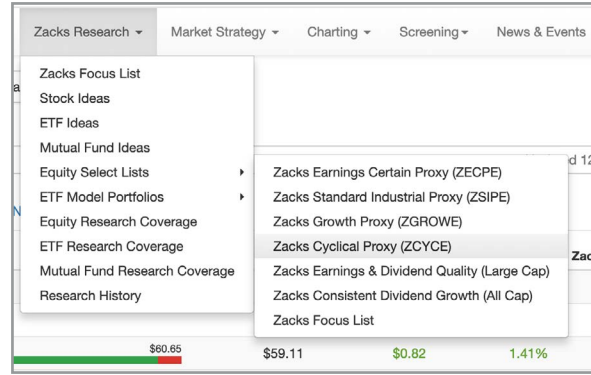
- » Quick access to the Analyst, Quantitative Snapshot and Digest Reports. **Click the report icons to view the individual reports.**
- » Refine your search by customizing the Date, Categories, Brokers and/or Industries settings.
- » To get industry-specific reports, **leave the ticker area blank**, select the desired industry from the menu & click Search.

Industries: <input type="text" value="OIL & GAS-DRILLING"/>	<input type="button" value="Search"/>
<input type="button" value="Reset"/> <input type="button" value="Clear"/>	

Equity Select Lists

Zacks Equity Select Lists serve as a starting point for long-term investors to build their portfolios.

 After clicking on a Select List, you can receive more information about that Select List by clicking the get information icon next to the name of the list.





ETF Model Portfolios


We offer a number of ETF Model Portfolios calibrated to meet the range of risk tolerances.

Note that these options are designed to work as diversified ETF portfolios — not necessarily as a list of individual ETF recommendations. The ETFs in each list were selected based on various factors, including the ETF’s expense ratios and bid-ask spreads, as well as the Zacks ETF Rank which takes into account asset class forecasts.




After clicking on a specific ETF Model Portfolio, you’ll notice two icons next to the portfolio’s name:

 Click on the information icon to learn more about our ETF Model Portfolios, and how they can help with asset allocation.

 Click on the performance icon to learn more about the performance and risk metrics of our ETF Model Portfolios.

Exchange-Traded Funds Model Portfolio-CONSERVATIVE  

Number of Companies: 13 « 1 » 25 50 100

Name	Symbol	Issuer	Investment Category	Last Close Price	Expense Ratio	Zacks ETF Rank	Report
SCHWAB US TIPS ETF	SCHP	CHARLES SCHWAB	Inflation-Protected Bond ETFs	\$54.87	0.05%	---	
VANGUARD GLOBAL EX-US REAL EST ETF	VNQI	VANGUARD	Real Estate ETFs	\$59.18	0.12%	---	
ISHARES CORE S&P 500 ETF	IVV	BLACKROCK	Style Box - Large Cap Blend	\$290.20	0.04%	2	

Market Strategy Reports

» **Weekly Sector and Market Earning Trends:**

Sheraz Mian, Zacks' Director of Research, offers earnings estimate revisions, expectations and analysis of US sectors.

» **Monthly Economic Outlook:** The Zacks

Investment Committee provides detailed analysis of metrics affecting the U.S. economy.

» **Monthly Investing Update and Asset**

Allocation: Zacks Chief Equity Strategist, John

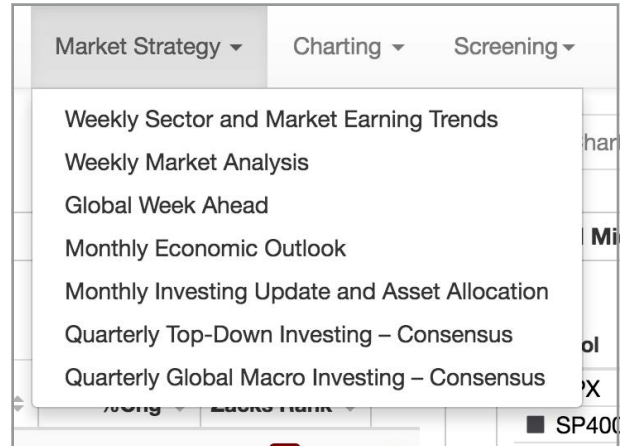
Blank, provides forecasts for all major asset classes and our U.S. and global GDP growth outlook.

» **Quarterly Top-Down Investing Consensus:** Summarizes forecasts of many investment

strategists for major asset classes and discusses reasoning underlying their outlooks.

» **Quarterly Global Macro Investing Consensus:** Macro consensus forecasts of global

commodity prices and foreign exchange rates.



Quote Monitor Setup

The first step to using the Quote Monitor is loading your custom tickers for Equities, Funds or Economic data.

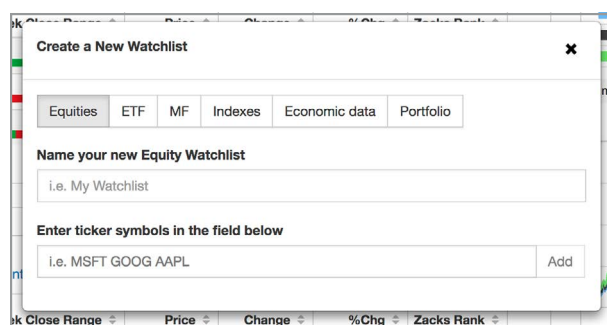
Manually enter ticker symbols to a New Watchlist

- » Click **Create a New Watchlist**



- » On the dialog that appears:
 - › Select the type of watchlist being created (Equities, ETF, MF etc...)
 - › Enter a name for the new watchlist.
 - › Enter ticker symbols in the space provided.

Note: You can add/remove tickers at a later time as well.

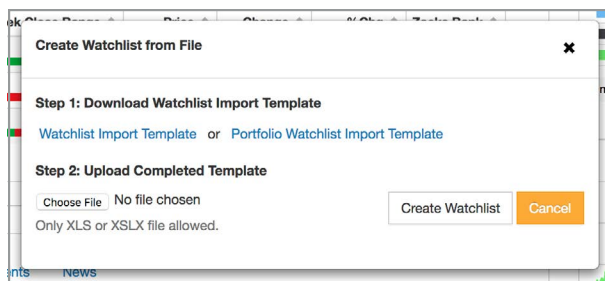


Batch load ticker symbols to a new Watchlist

- » Click **Create Watchlist from File**

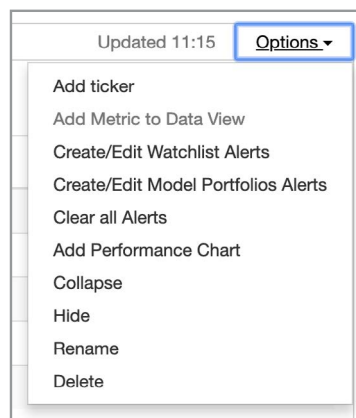


- » On the dialog that appears:
 - › Download the Import Template in Step 1, complete the required fields highlighted in yellow and save the Excel file.
 - › Click **Choose File** and browse to the file you just saved.
 - › After you have selected the file, click **Create Watchlist** to load the tickers into Quote Monitor.
 - › A new Watchlist will now appear in Advisor Tools with your entered information.

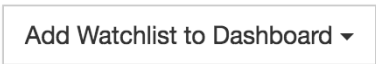


Make changes to an existing Watchlist

The **Options** menu provides multiple features that allow customization of the existing watchlists.



- » **Add Ticker:** Option to add more tickers to the watchlist.
- » **Add Metric to Data View:** Allows customization of the items selected on the Data tab.
- » **Create/Edit Watchlist Alerts:** Add alerts for changes in Zacks Rank, available reports and financial statements, earnings surprises and more.
- » **Create/Edit Model Portfolios Alerts:** Add alerts when stock enters or exits Zacks Equity Selects Lists.
- » **Clear all Alerts:** Remove all existing alerts.
- » **Add Performance Chart:** Creates mini chart with options for performance & percentage change.
- » **Collapse/Expand:** Minimizes or maximizes the watchlist window.
- » **Hide:** Remove the watchlist from view, but not delete the list permanently.
 - › Hidden watchlists can be restored by selecting **Add Watchlist to Dashboard**
- » **Rename:** Change the name of the watchlist.
- » **Delete** Completely and permanently remove the watchlist. This cannot be undone.



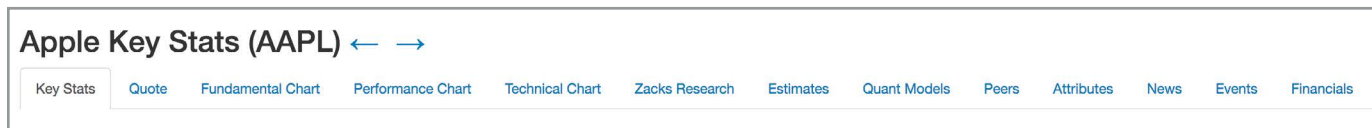
Customize Watchlist Mini Chart

- » Select the symbol(s) to chart using the checkboxes next to each symbol.
- » Use the **Options** menu to change display type to Technical, Performance, or 1 Year % Change.
- » **Delete** will remove the mini chart from current view.

Markets				Updated 12:15	Options ▾
Symbol	1 Day Return	Annualized Return			
<input type="checkbox"/> \$DJI	-1.48%	13.78%			
<input type="checkbox"/> SPX	-1.58%	11.64%			
<input type="checkbox"/> COMPX	-1.96%	17.69%			
<input type="checkbox"/> RU2TX	-3.16%	12.40%			
<input type="checkbox"/> SP400	-2.41%	10.02%			
					63.01%
					41.99%
					33.19%

Equity, Mutual Fund & ETF Detailed Views

Advisor Tools detailed views are accessed by either clicking on a ticker symbol within the system or using the search feature found on the main menu.

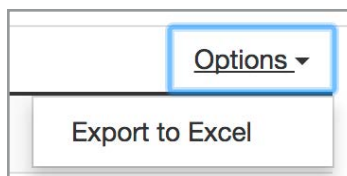


» **Key Stats:** Many of the most popular metrics for quickly analyzing Zacks model scores, company data, financial statements and ratios. Categories include:

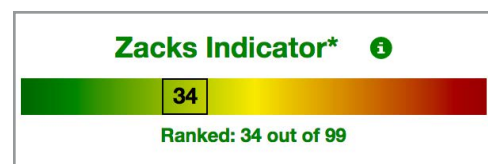
- › Valuation Ratios
 - › Liquidity and Solvency
 - › Management Effectiveness
 - › Consensus Price Targets
 - › Income Statement
 - › Balance Sheet
 - › Cash Flow Statement
 - › Dividend & Shares
 - › Advanced Metrics
 - › Price Performance
 - › Margins
 - › Consensus Estimates
 - › Employee Count Metrics
 - › Zacks Alpha Scores
- › **Quick Charting** ability is available for many of the Key Stat metrics, just click on the hyperlinked items or small charts to view chart of selected item.



- › Select **Export to Excel** from the options menu to send all Key Stats to an Excel workbook for further analysis.



- » **Quote:** General overview with latest quote, options data and key metrics.
- » **Fundamental Chart & Performance Chart:** Create, edit and save customized charts.
- » **Zacks Research:** Access Scorecard and research information with peer comparisons.
- » **Estimates:** Views include:
 - › Detailed Estimates
 - › Earnings Estimates
 - › Sales Estimates
 - › Agreement - Estimate Revisions
 - › Magnitude - Consensus Estimate Trend
 - › Upside - Most Accurate Estimate Versus Zacks Consensus
 - › Surprise - Reported Earnings History
 - › Annual and Quarterly Estimates By Analyst
- » **Quant Models:** Detailed view of Zacks Quant model output.
 - › Includes Zacks Rank, Zacks Indicator Score, Style Scores, Earnings Quality, Price Response & Insider Rank.



» **Peers:** View comparisons for peers, sectors and industries across multiple categories and data items.

› Graphical display shows magnitude of differences:

Peers	Relative Strength 52 weeks	Relative Strength 2
APPLE INC (AAPL)	87	88
AMAZON.COM INC (AMZN)	75	81
3D SYSTEMS CORP (DDD)	90	94
ALPHABET INC-A (GOOGL)	71	77
HP INC (HPQ)		82
INTL BUS MACH (IBM)	41	30

» **Attributes:** Tabular view of data items by categories, with customization options to include or exclude sector, industry and peer data.

Apple Attributes (AAPL) ← →		
	APPLE INC (AAPL)	Global Sector INFO TEC
Valuation		
Price/Book Value	6.01	4.
Cash Flow Per Share	\$10.43	\$3.
Price/Cash Flow	14.74	18.
Price/Sales	3.63	3.
Enterprise Value/EBITDA	11.39	8.

» **News:** View ticker specific news.

› Use the list control to isolate the provider news displayed:

Apple News (AAPL) ← →	
<ul style="list-style-type: none"> ✓ All News Providers Zacks Others 247WallSt Alliance News Amigobulls Associated Press, The Benzinga BidnessEtc Business Wire CNN 	<ul style="list-style-type: none"> Qualcomm's Mesh Netwo t Realist Is Broadcom's Revenue E t Realist What Cisco's Acquisition otleyFool 3 Growth Stocks for Brigh allSt Apple's Siri Leads in Anst com Apple Music to revive


- » **Events:** Calendar or list view enables event filtering for entire universe of securities or a single stock.

- » Select the date using the drop downs.
- » Select the types of events you would like displayed.
- » Enter specific ticker symbols to see events for only that ticker.

- » **Financials:** View income, balance sheet, cash flow, segment info & key metrics for annual or quarterly periods.

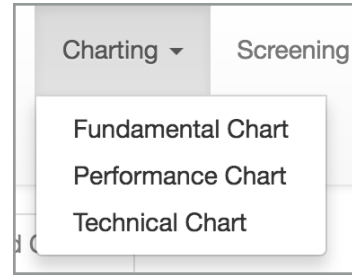
- › Options allow viewing standard vs company-specific statements & restated vs originally reported.

Ticker	Reporting Basis	Period	From	To	Form Type	Report Format	Update Type
AAPL	Annual	Last 10	1977	2018	Income Statement	Company Specific	Most Recent
APPLE INC FYE=9 (September)							
Annual - Income Statement - Company Specific							
		Fiscal period	2016	2015	2014	2013	20
		Period End Date	9/30/2016	9/30/2015	9/30/2014	9/30/2013	9/30/
Net Sales			215,639.00	233,715.00	182,795.00	170,910.00	156
Total Revenues			215,639.00	233,715.00	182,795.00	170,910.00	156
Cost of sales			131,376.00	140,089.00	112,258.00	106,606.00	87
Gross Profit			84,263.00	93,626.00	70,537.00	64,304.00	68
Research and development			10,045.00	8,067.00	6,041.00	4,475.00	3
Purchased in-process research and development			--	--	--	--	--
Selling, general, and administrative			14,194.00	14,329.00	11,993.00	10,830.00	10
Restructuring Costs							

- › **Reporting Basis:** Select Interim or Annual.
- › **Period:** Select one of the preset options or Other and enter custom From & To.
- › **Form Type:** Using the dropdown list select any of the available view types.
- › **Report Format:** Standard (utilizes a template to combine “like” items) or Company Specific (as reported by the company)
- › **Update Type:** Most Recent (restated data) or Orig. Reported (non-restated data)
- › **Update Report Button:** Select to refresh view with options selected in prior steps.
- › Click **Export to Excel** button () to copy data to an Excel worksheet.

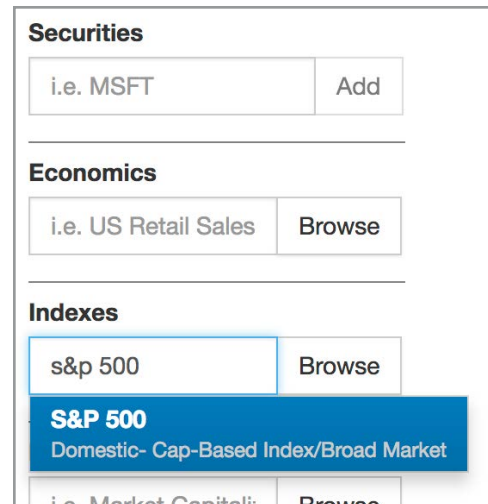
Charting

The charting features available within Zacks Advisor Tools allow for saving chart templates, a simple process to add/remove tickers, automated loading of Watchlist tickers, plotting multiple metrics and many other options.

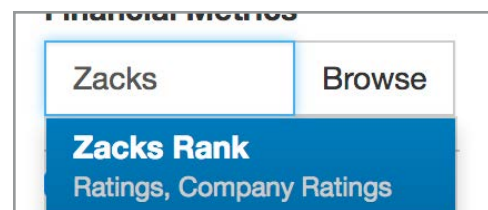
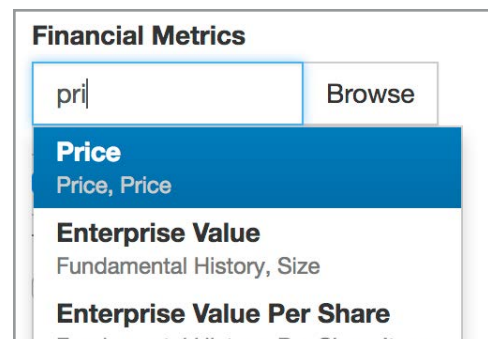


Fundamental Charts

- » Enter an Equity, Economic or Index ticker.
 - › The entry areas utilize Intellisense for quickly finding results; just start typing a ticker or name until your desired item is displayed. Click the **ADD** button or press **ENTER** to make selection.
 - › Economic & Index areas also have a **Browse** button if a more detailed search is needed.



- » Select a **Financial Metric** to plot on the chart
 - › There are 2 methods to make this selection:
 1. Type a keyword and let Intellisense feature provide a list of options.
 2. Click **Browse** and search the categories and items to make a selection.
 - › If viewing metrics versus a relative ticker is desired, check the **Relative** box and enter the desired ticker.
 - › The Zacks Rank is now available as a metric to be included on any chart. It can be easily searched for or found under **Ratings > Company Ratings**.



Zacks Rank

- 1 Strong Buy**
- 2 Buy**
- 3 Hold**
- 4 Sell**

Why can't I see the Zacks Rank?

The Zacks Rank for stocks, ETFs and mutual funds is not available in all versions of Zacks Advisor Tools.

To enable access to the Zacks Rank, contact your Zacks representative or email advisorstools@zacks.com.

» Customize remaining options to create desired chart layout.

- › **Log Scale:** Check this box to create logarithmic scaled charts.
- › **Recession Shading:** Display periods of economic recession on the chart.
- › **Single Panel:** All tickers and metrics are displayed within one chart when selected.
- › **Panel per Financial Security:** A panel is added to the chart for each identifier entered.
- › **Panel per Financial Metric:** Each active metric will be displayed in a panel for all identifiers.
- › **Raw Value:** No transformation of data, values represent the “raw” data stored.
- › **Performance:** Each series is transformed to a growth series and based to zero.
- › **1 Year % Change:** The series are converted to 1yr % change format and plotted on each panel.

Log Scale

Recession Shading

Panel Layout

Single Panel

Panel per Financial Security

Panel per Financial Metric

Data Format

Raw Value

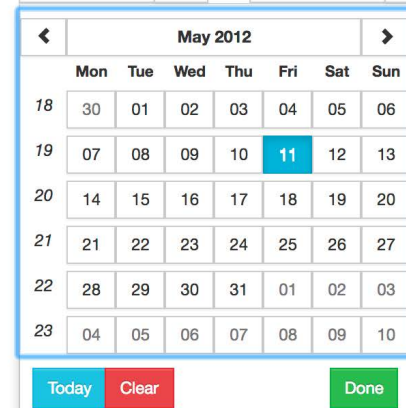
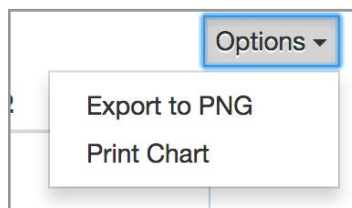
Performance

1 Year % Change

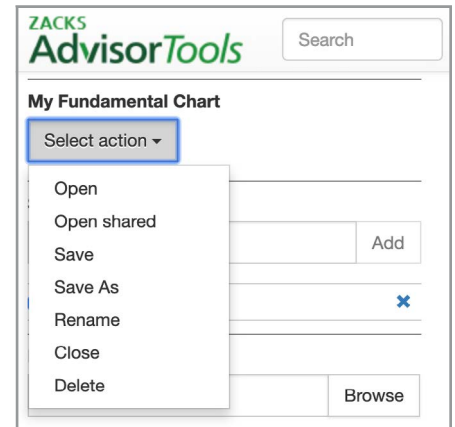
» Select a time period using either the preset options or entering custom From & To dates.

1m 3m 6m YTD 1y 2y 3y **5y** 10y 20y Max 05/11/2012 To

» Export the chart as a PNG image or Print from the menu found in the upper right corner of the charting area.



- » **Open, Open Shared, Save, Save As, Rename, Close,** and **Delete** options are available on the main chart menu to assist with managing your chart templates and library.
 - › After setting all chart options, simply save chart to your library for reference later.
 - › Retrieve your chart template using **Open** to load the desired chart view.
 - › Use Open Shared to open a library of pre-defined charts provided by Zacks.



Performance Charts

Performance charting options are similar to Fundamental charts, but several differences are noted below.

- » Additional option to link the chart to your watchlists.

Display Tickers From

MF watchlist: MY%20MF%201 ▾

- » Select either Price Return or Total Return.

Performance Format

Price Return

Total Return

- » Format the data as either a Raw Percent change or growth of \$1,000.

Data Format

Raw Percent

Value of \$1,000

Technical Charts

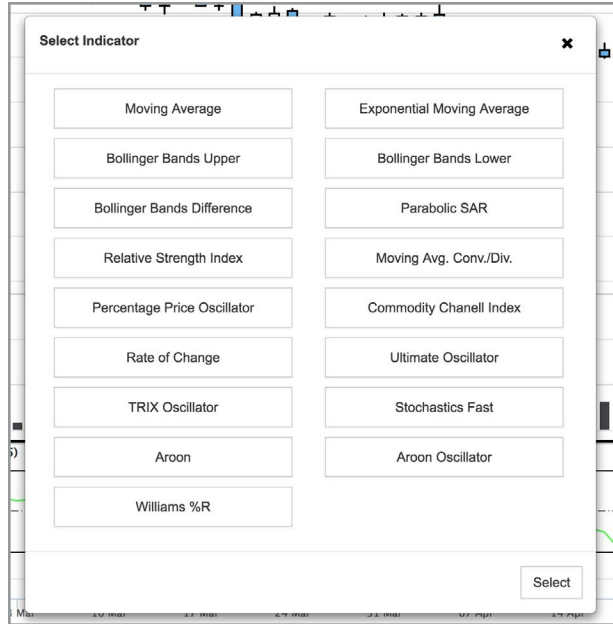
Technical charting provides multiple options for plotting some of the most popular technical metrics on a single chart.

- » Use the Browse feature to select the desired Indicators.

Indicators

Indicator	Browse
-----------	---------------

- » Select the desired indicator and then click the Select button to proceed.



- » After selecting the indicators, set the parameters for each indicator.

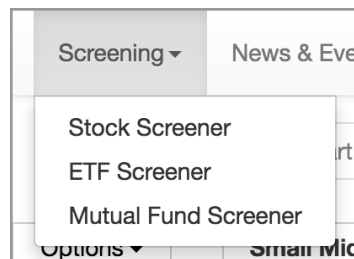
Indicators		
Indicator		Browse
<input checked="" type="checkbox"/> Moving Average	50	X
<input checked="" type="checkbox"/> Moving Average	200	X

- » Additional chart options include selecting a style (Line vs Candlesticks) and Period (Daily, Weekly or Monthly).

Chart Style
Candlestick ▾
Period
Daily ▾

Screening Equities, Mutual Funds and ETFs

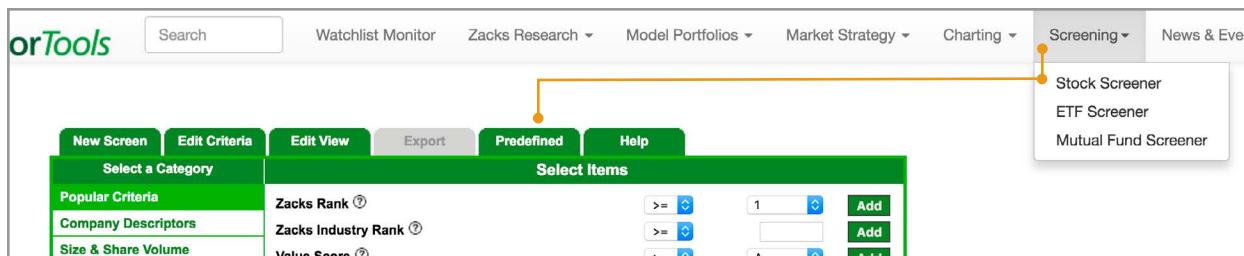
Advisor Tools provides easy-to-use screeners for Equities, Mutual Funds and ETFs. To begin the screening process, select Screening from the main Advisor Tools menu and then the desired screener type (Stock, ETF or Mutual Fund).



Using Zacks Predefined Screens

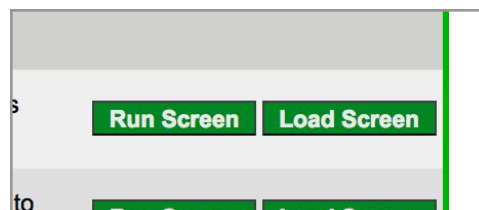
Zacks' Predefined Screens will help you find the types of companies that meet your criteria. Zacks has included several screens that many investors use on a regular basis to find potential winners.

- » Start by selecting **Screening > Stock Screener** from the main menu and then click the **Predefined** tab.



- » You can now select from the many predefined screens included with your subscription. To view or run the criteria used for each screen, simply click on the Load Screen or Run Screen options.

- › **Load Screen** will take you to the Edit Criteria tab and display the items and criteria used to determine the final output.
- › **Run Screen** will run the screen criteria on the Zacks universe of stocks and display the results.

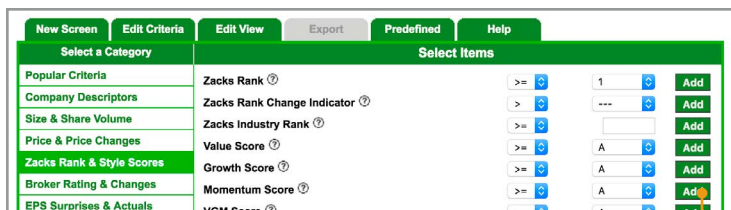


Creating a New Screen

If you're interested in creating your own stock screens with custom parameters, click the **New Screen** tab and then follow the steps noted below.

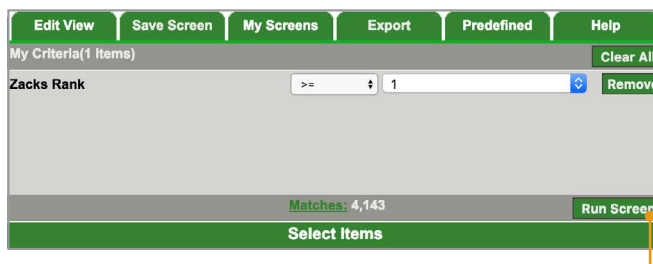
Step 1:

- » Navigate the item categories to find desired data items.
- » Enter parameters for each item and **Add** item to your criteria.



Step 2:

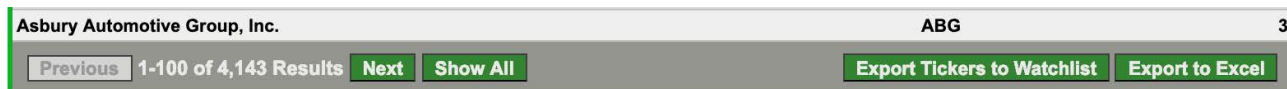
- » After selecting all data items, run the screen and view results by clicking the **Run Screen** button.



Step 3:

After successfully running the screen criteria there are additional options available to modify, export or change the results view.

- » **Edit Criteria** tab will return you to the data item selection views where you can add and/or remove data items from the criteria.
- » **Export to Excel** button is available when viewing your screen results (bottom right).
 - › When selected, this will export all items and stocks, funds or ETF tickers to an Excel CSV file.



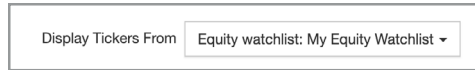
- » **Edit View** tab allows selection of items to include with the output, but these items do not require criteria for screening. Items are added as display only.
 - › Click **Edit View** and then select the items by clicking the checkbox next to each item.
 - › Run the screen again to view new results.

Stock, ETF and Mutual Fund Table Builders

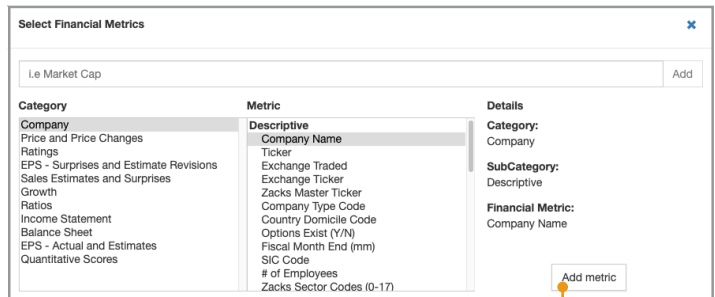
Our Table Builders allow you to bring in tickers from your watchlists and add up to 12 metrics to compare your stocks, ETFs or mutual funds. With Table Builder, you have spreadsheet functionality within Advisor Tools, so you can easily prepare “comp sheets” for various holdings.

Building a Table

» Choose a watchlist you wish to use from the **Display Tickers From** pulldown menu.



» Use the **Add Metric** option under the Options pulldown menu at right to select financial metrics to compare. You may select up to 12 metrics.



Opening and Saving a Table

» Use the **Select Action** pulldown menu at left to open an existing table, save a table, or to rename or delete tables.

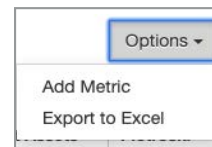
Stock Table Builder

Select action ▾ Test Display Tickers From: Equity watchlist: My Equity Watchlist ▾ Options ▾

Symbol	PE TTM	Market Capitalization (\$mil)	Dividend Yield %	Long Term Debt/Common Equity	Sales Q0 TTM/Q-4 TTM	EPS Q-0/Q-4	Beta vs Russell 2000 (60 months)	PE TTM 5 Year High	Surprise - Average EPS Surprise - Last 4 Quarters	Piotroski ROA signal	Total Current Assets Annual (\$Mil)	Piotroski Score
AAPL	15.50	\$926,356	1.55%	0.79	9.38%	7.46%	0.82	20.64	3.47%	1	\$131,339	6
MSFT	27.03	\$899,104	1.58%	0.82	19.82%	14.58%	0.65	28.95	9.26%	1	\$169,662	9
XOM	16.13	\$340,437	4.08%	0.10	12.12%	71.59%	0.79	40.79	7.28%	1	\$47,973	9
JNJ	16.96	\$372,118	2.60%	0.46	6.71%	13.22%	0.37	19.72	1.61%	1	\$46,033	7
GE	15.09	\$86,478	0.40%	1.85	-0.39%	-37.04%	0.99	23.38	3.03%	0	\$121,917	4
TMO	24.18	\$107,272	0.28%	0.64	16.44%	16.49%	0.68	23.64	3.13%	1	\$10,625	7
AMZN	87.72	\$867,316	0.00%	0.54	30.93%	179.63%	1.23	963.48	88.81%	1	\$75,101	8
NVDA	29.92	\$106,959	0.36%	0.21	20.61%	-63.06%	1.53	53.10	10.28%	1	\$10,557	7

Exporting a Table

» Use the **Export to Excel** option under the **Options** pulldown menu at right to export your table into an Excel spreadsheet.



NOTE: Data exported to an Excel spreadsheet is no longer dynamic. If you wish to create Excel spreadsheets with dynamic data, talk to us about our Zacks Excel Link plug-in.

Customer Support

If you ever have questions about **Zacks Advisor Tools** or need assistance, please contact us using the information below and we'll be happy to assist you.



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