

Whether you're new to screening or an experienced user, the MarketScreen Screener quickly and easily identifies companies that meet your investing objectives. Create your own actionable target lists using over 200 variables, such as earnings estimates, market data, popular financial ratios, and industry comparisons. The data ranges over a spectrum of historical filing periods – annual and quarterly – and includes data for trailing twelve months and YTD, so your queries can be as robust as you can imagine. This guide is a primer to introduce you to the MarketScreen Screener.

Each screen is made up one or more 'criteria' that filter a universe of over 10,000 U.S. Equities, private companies, and ADRs to meet specific investment goals. A criterion is made up of a variable (a metric such as 'Pre-Tax Return on Assets ') plus a condition that you specify (such as 'greater than 4%'). MarketScreen also provides pre-built screens and the ability to customize and save your own screening criteria for future re-use.

Additional screening functionality is in development, including advanced anomaly detection tools and the ability to:

- set alerts to be notified when a new company fulfils your screening requirements
- screen by industry and compare companies to industry mean and averages
- save sub-components of a screen

To create your own custom screen, follow these steps:

Start by clicking on the Screener tab on the top menu of the MarketScreen home page. This will bring you to the Screener page.

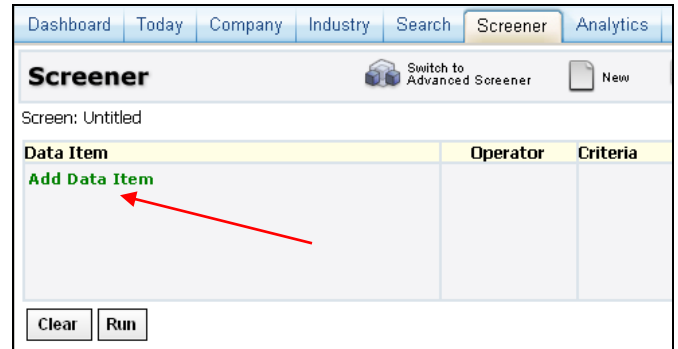


Click on 'Add Data Item' to choose data items from:

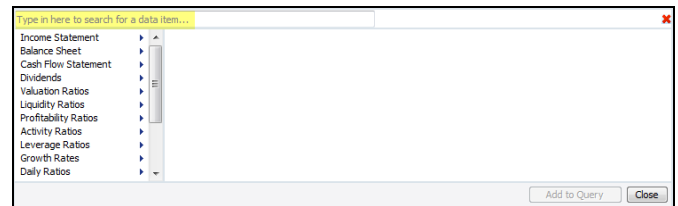
- Income Statement
- Balance Sheet
- Cash Flow Statement
- Dividends
- Valuation Ratios
- Liquidity Ratios
- Profitability Ratios
- Activity Ratios
- Leverage Ratios
- Earnings Estimates
- EPS Growth Rate Estimates
- Dividend Estimates

- Recommendation History
- Market Data

The 'Add Data Item' is set up as a tree structure – clicking on one of the categories will bring up the specific criteria from which to choose. You will also select a time period, such as last fiscal year, upon which to base the criteria.



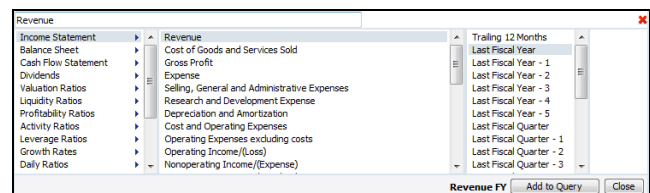
Select the data item from the menu. You can use the menu on the left, or begin typing the data item in the text box.



As you begin typing, the menu below will change to match the keyword that is being entered.

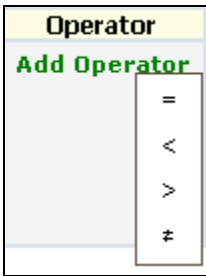


In this example, let's choose the Income Statement and Revenue for the Last Fiscal Year. Click the 'Add' button to select this metric.

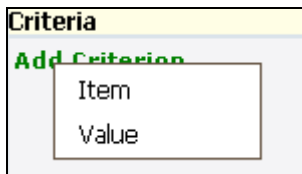


## Step 2 Add criteria

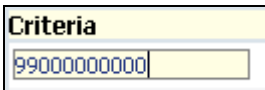
Now add a comparison value or data item. Under the 'Operator' column, click 'Add Operator' and choose one of the 4 operators: 'equals', 'less than', 'greater than', or 'is not equal to'. We're going to select 'greater than'.



Then choose the comparison type – a value or yet another data item:




Here we'll choose a revenue value.



The results of this screen are immediately returned – 12 matched items for 12 total matches for this first data item screen:

Data Item	Operator	Criteria	Matches	Total
FY Revenue	>	99000000000	16	16
Add Data Item				

To delete the screening criterion, click the  button to the left of the Data Item.

## Step 3 Add comparison item

To add an **including** criterion (a.k.a “and”, “+”) click ‘Add Data Item’ again and choose the next metric. Let’s add a screen to find companies of the 11 returned that pay a dividend:

Data Item	Operator	Criteria	Matches	Total
FY Revenue	>	99000000000	16	16
FY Dividend	>	0	2601	10
Add Data Item				

Display 10 Query Results

Matches	Total
16	16
2601	10

There are 2601 companies that match just the dividend criterion. The ‘Total’ results show that 10 companies of the 16 that passed the revenue criterion, have passed screening for a dividend greater than 0. Click the ‘Clear’ button to start over.

## Step 4 View companies

You may now click the ‘Display Query Results’ button to see these companies, their revenues, and dividends. You can sort the items presented in the Results dialog:

Clear				
Results (10)				
Ticker	Company Name	Revenue FY	Dividend FY	
AIG	AMERICAN INTERNATIONAL GROUP INC	110,064,000,000.00	.72	
T	AT&T INC.	118,928,000,000.00	1.45	
CVX	CHEVRON CORP	220,904,000,000.00	2.32	
COP	CONOCOPHILLIPS	194,495,000,000.00	1.62	
ECSPQ	ENRON CORP/OR/	100,789,000,000.00	.64	
XOM	EXXON MOBIL CORP	404,552,000,000.00	1.44	
GE	GENERAL ELECTRIC CO	172,738,000,000.00	1.13	
GM	GENERAL MOTORS CORP	181,122,000,000.00	1.00	
HPQ	HEWLETT PACKARD CO	104,286,000,000.00	.31	
WMT	WAL MART STORES INC	378,799,000,000.00	.90	

## Step 5 Export data

Click the ‘Export’ button to place the results of the screen into an Excel™ spreadsheet.

	A	B	C	D
1				
2				
3				
4				
5	<b>Ticker</b>	<b>Company Name</b>	<b>Revenue FY</b>	<b>Dividend FY</b>
6	<a href="#">AIG</a>	AMERICAN INTERNATIONAL GROUP INC	110,064,000,000.00	0.72
7	<a href="#">T</a>	AT&T INC.	118,928,000,000.00	1.45
8	<a href="#">CVX</a>	CHEVRON CORP	220,904,000,000.00	2.32
9	<a href="#">COP</a>	CONOCOPHILLIPS	194,495,000,000.00	1.62
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12	<a href="#">GE</a>	GENERAL ELECTRIC CO	172,738,000,000.00	1.13
13	<a href="#">GM</a>	GENERAL MOTORS CORP	181,122,000,000.00	1
14	<a href="#">HPQ</a>	HEWLETT PACKARD CO	104,286,000,000.00	0.31
15	<a href="#">WMT</a>	WAL MART STORES INC	378,799,000,000.00	0.9
16				

Clicking on the company ticker symbol hyperlink will launch your browser to display company specific information for the company in context:

**GENERAL ELECTRIC CO (GE)** Summary

Last Trade: \$33.74  
 Change: 0.34 (1.02%)  
 Volume: 2,640,390

Trade Time: 09:37 AM EST  
 52 Week Range: \$31.65 - \$42.15  
 Market Cap: \$336.79B

GENERAL ELECTRIC CO as of 3/11/2008

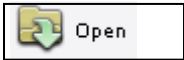
Financials				Fiscal Period: Q4 2007 (Ends 12/31/07)			
<b>Income Statement</b>				<b>Cash Flow</b>			
Revenue	\$172.74B	13.8	14.2	Operating Cash Flow	\$45.97B	50.0	69.0
Net Income	\$22.21B	7.07	20.7	Investing Cash Flow	(\$72.42B)	40.9	142
Gross Profit	\$72.36B	14.9	(89.7)	Financing Cash Flow	\$28.21B	21.4	38.5
<b>Balance Sheet</b>				<b>Ratios</b>			
Total Assets	\$795.34B	14.2	4.42	Price / Earnings	17.0	(8.65)	(11.3)
Total Cash	\$61.18B	(1.18)	(5.97)	Price / Book	3.25	(4.97)	(13.6)
Total Liabilities	\$671.77B	16.3	4.74	Price / Sales	2.17	(13.5)	(13.9)

Latest Filings

View	Form	Filer	Received (Period)	Actions
	4	IMMELT JEFFREY R	03/11/08 (03/11/08)	
	DEF 14A	GENERAL ELECTRIC CO	03/03/08 (04/23/08)	

## Step 6 Save custom screens

Don't forget to save your customized screen! Once you have named and saved your screen, you'll be able to access it again in the future by clicking on the icon:



You can also select pre-existing screens by choosing



Preset Screens include:

- Deep Value
- Large Cap Value
- Solid Performers
- Stable Value

Selecting a preset screen will bring up the criteria that was used to create the screen. You can also add your own criteria to the preset screens to further refine your results.

## Advanced Screening

Click on the 'Switch to Advanced Screener' button on the top of the screener page for advanced screening options.

**Screener**

New Query 1

Data Item	Operator
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The advanced screening window opens that allows you to create custom formulas and criteria.

To begin using advanced screening you can:

- Use the Add Data Item button to choose data items from key filing sections or
- Begin typing a custom query in the text box below
- Use the buttons above the box to build your formulas.

Query Editor: (Revenue TTM) / (Assets - Current TTM) > 5 AND (Revenue FY) > 9900000000

Revenue

- Revenue
- Total Noninterest Revenue
- Company Revenue as compared to Industry
- Revenue to Assets
- Accounts Payable Growth to Revenue Growth
- Revenue to PPE
- Annual Revenue Growth
- 3 Year Revenue CAGR
- 5 Year Revenue CAGR

Trailing 12 Months

- Last Fiscal Year
- Last Fiscal Year - 1
- Last Fiscal Year - 2
- Last Fiscal Year - 3
- Last Fiscal Year - 4
- Last Fiscal Year - 5
- Last Fiscal Quarter
- Last Fiscal Quarter - 1
- Last Fiscal Quarter - 2
- Last Fiscal Quarter - 3

Run Revenue FY Add to Query