Quick tips to get the most out of your screener

Index

How to get started – Log in

To get to you first have to log into your account.

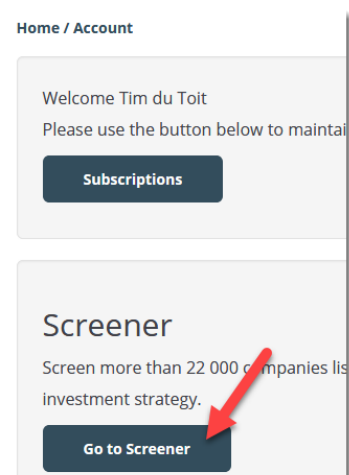To do this go to: http://www.quant-investing.com

Click on the **lock icon** on the top right of the screen

Fill in your user name and password and click the **Login** button
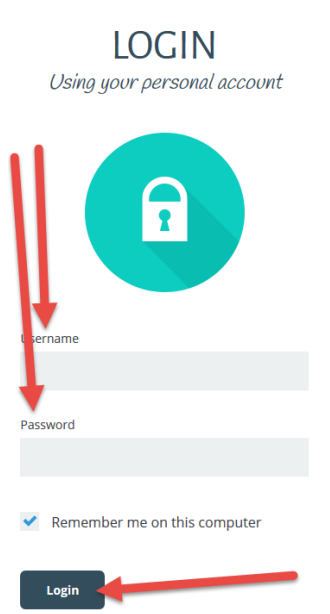
On the next screen click on the button **Go to screener**
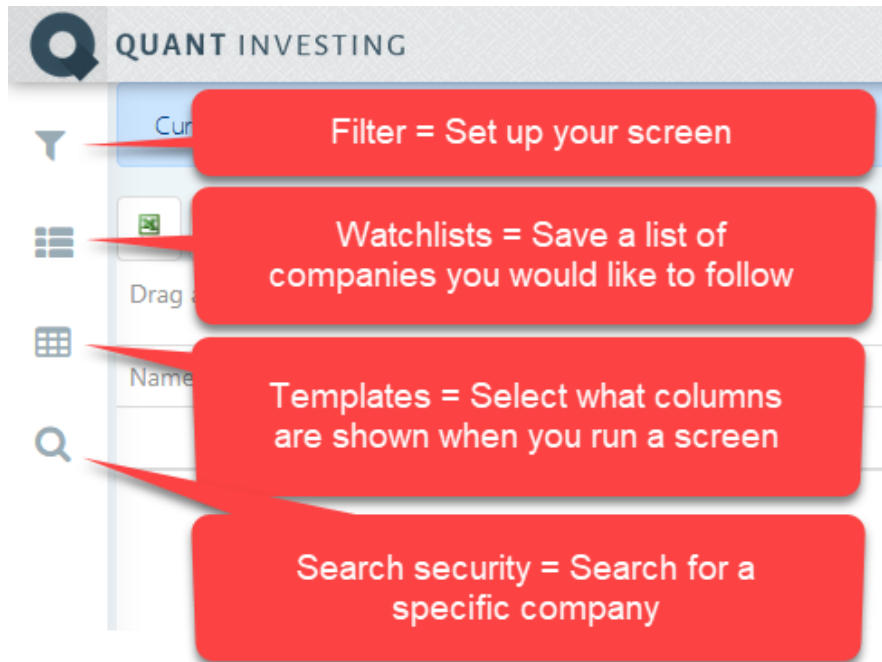
The next page looks like this:

The four icons on the left are where you find the main functions of the screener which are:

## Always use at least one slider

The functionality of the screener is based on the use of the four sliders at the top of the screener page as shown below:

In order to get any output from the screener you **must** use at least one of the sliders

To start the screener - get a list of companies

To get a list of companies that match the criteria you have selected click on the **Apply** button.
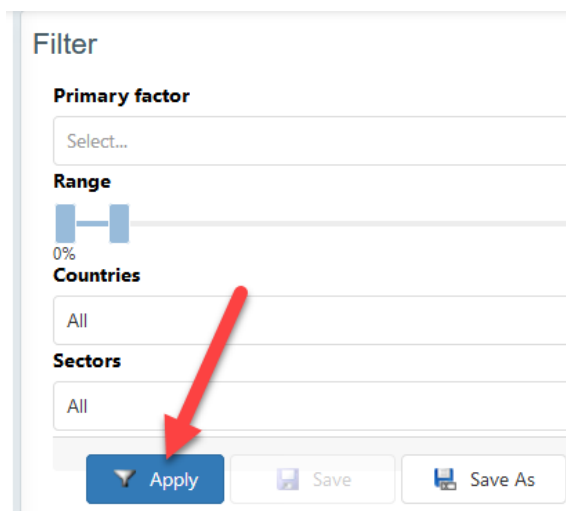
Choose and save only the columns you need - Templates

The screener allows you to save the columns you would like to see with each Filter.

This is called a **Template**.

This means you can save different columns you would like to display in different **Templates**. For example a "**Value**" template with value ratios and indicators and a "**Momentum**" Template with momentum indicators.

To save a Template first click on the **Templates** icon.
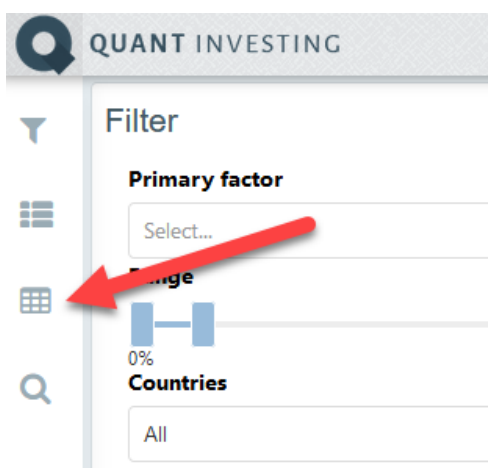
You will see a few columns are already selected for you as a default. You can however change this and create as many **Templates** as you like.

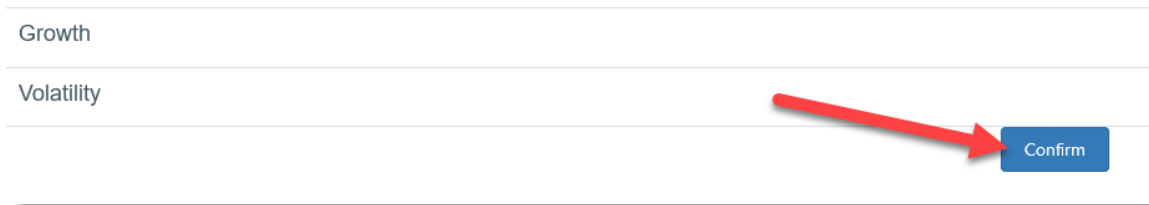Too add or remove columns click on the **Add/remove columns icon**
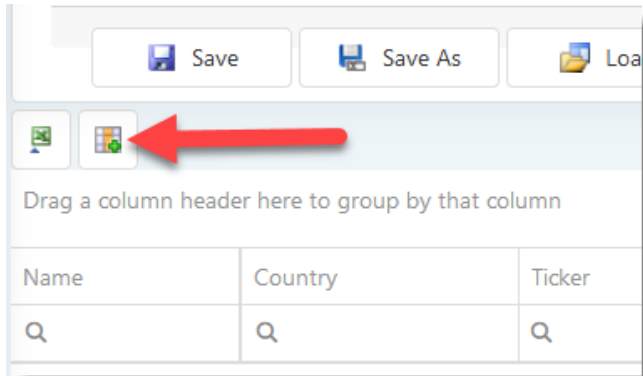
To **add a ratios or indicators** simply click on any of the headings and then click the box next to the ratio you would like to select.
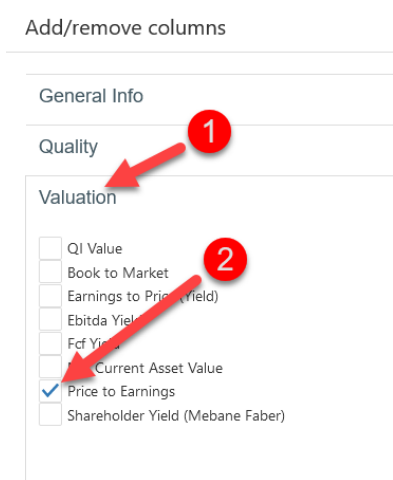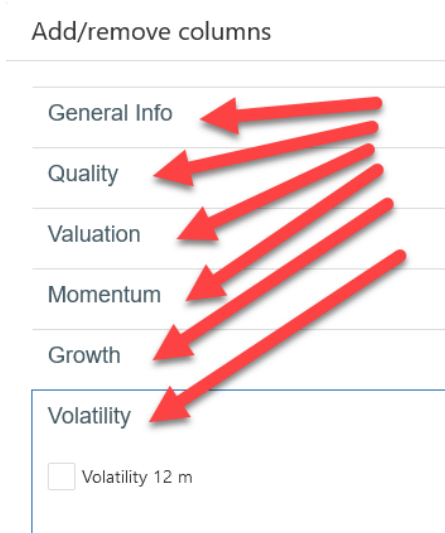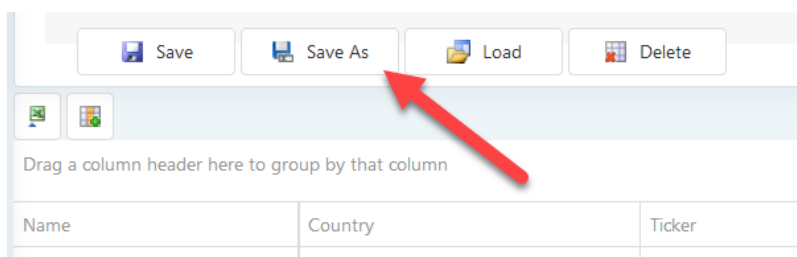
The same way you can unselect the tick marks next to all the indicators you do not need.

To **save your selection first click on the Confirm button** at the bottom of your screen.
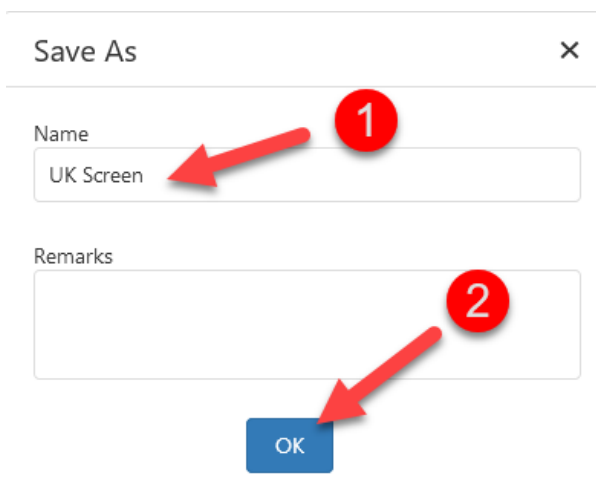
Growth	
Volatility	
	Confirm

Then to save your **Template** click on the **Save As** button, give your new Template a descriptive name, then click the **OK** button to save the Template.

🖫 Save	🖫 Save As	📂 Load	📷 Delete

Drag a column header here to group by that column

Name	Country	Ticker

Save As ✕

Name

UK Screen

Remarks

OK

How to link Templates to your screen or filter

Templates are saved separately – which means you can save as many as you like.

You can however also save a Template so that it is loaded automatically when you call up a Filter (Screen).

To do this click on the drop down arrow in the box below the heading **Template to load with filter**.

From the list that appears **select the Template** you would like to load.
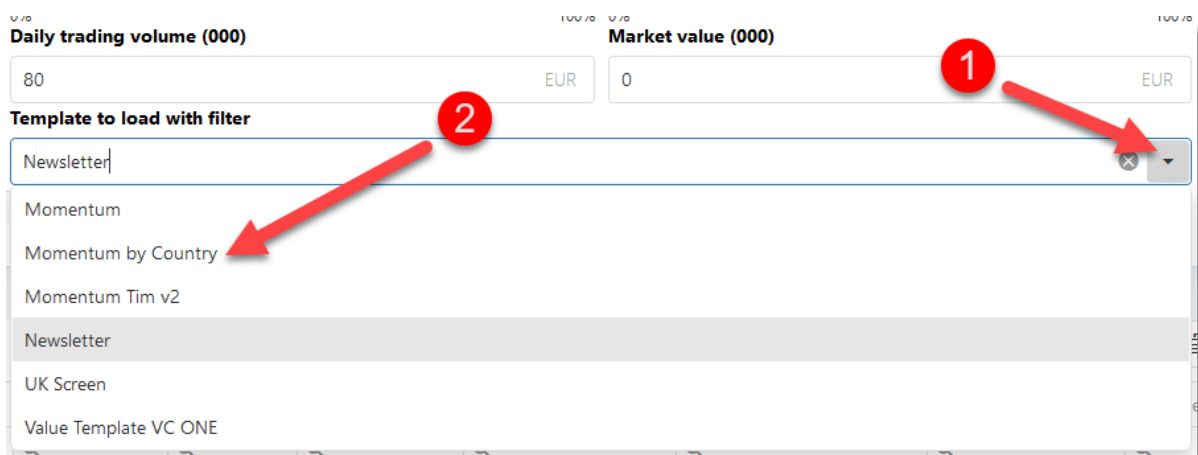
Remember to click on the **Save button** to save the template you have linked to the screen or filter.

How to load a different Template with your filter or screen

Even though you have linked a Template to a Filter does not mean you cannot load any other templates with a Filter.

To do this:

1. Click on the Templates icon
2. Click on a template to select it
3. Click the Load button to load the Template

This means that with every **Filter** you run you can select any **Template** you have saved.
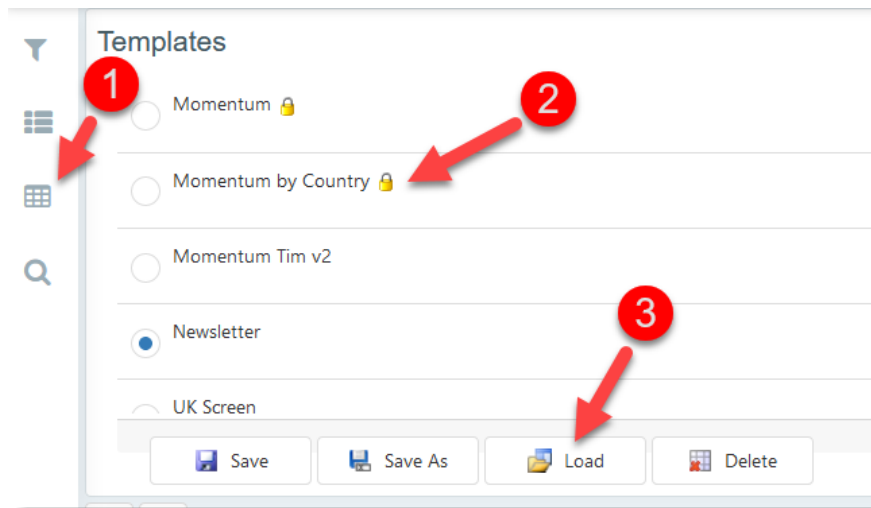
Change the sequence columns are displayed

You can easily change the sequence columns are displayed. To do this simply move your mouse over a column heading, left mouse click on the column heading and drag it to the left or right.

A line will show you where the column will be moved to.

Save your filter

You can save any filter you have created, including the Template you have linked to the Filter, by clicking on the **Save As** button and then on **Save to template.**
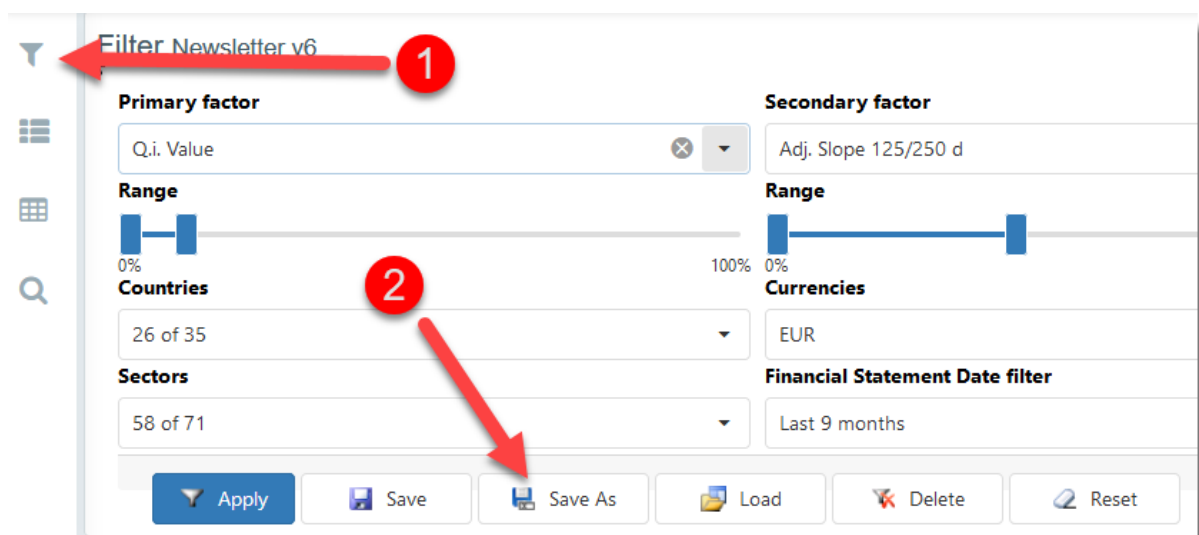
When you save the screen, columns selected as well as the column sequence from left to right will also be saved.

If you click the **Save button** the Filter you loaded will be overwritten with any changes you have made.

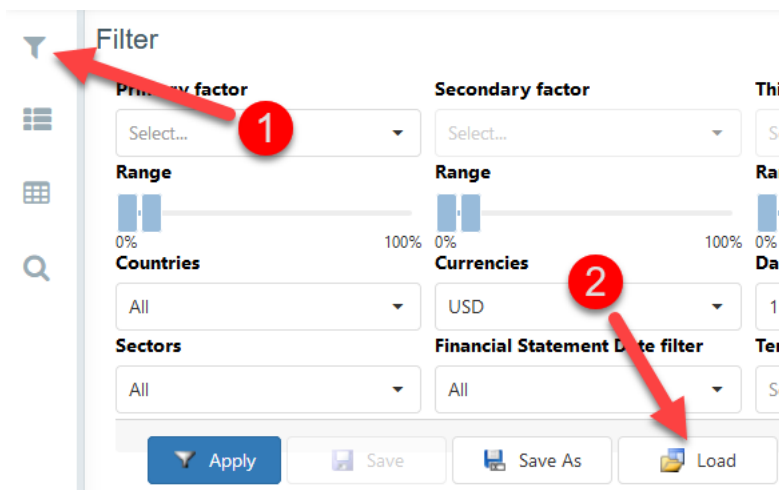## Load your own or a pre-defined Filter

The fastest way to get started is to use one of the Filters or screens we have saved for you.

To load a template first click on the **Filter** icon and then on **Load** button
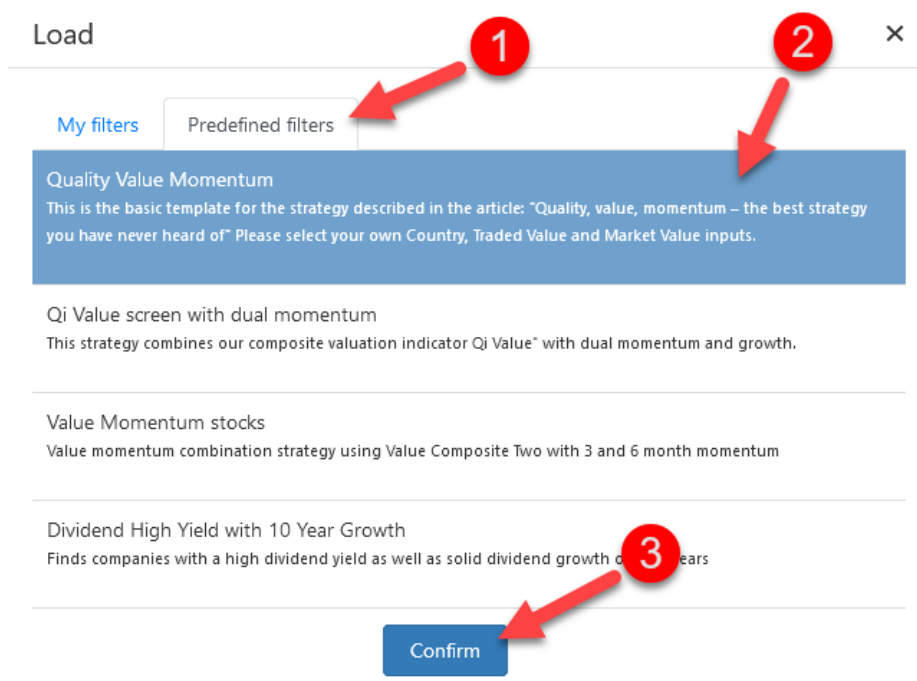

To load your own Filter:

1. Click on the **My Filters** tab
2. Click on one of the screens or filters to select it
3. Click on the **Confirm** button to load the screen or filter

To load a pre-defined Filter:

1. Click on the **Predefined filters** tab
2. Click on one of the screens or filters to select it
3. Click on the **Confirm** button to load the screen or filter

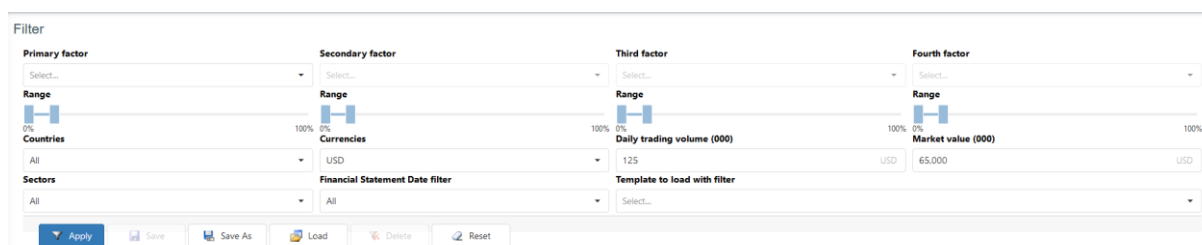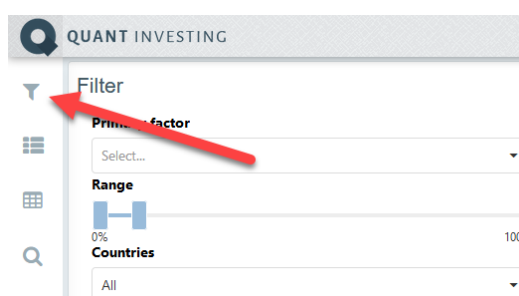## Hide the filter criteria

As you may have seen the filter criteria box is quite large:

After you have run your filter can hide the box completely to focus on the companies you have selected.
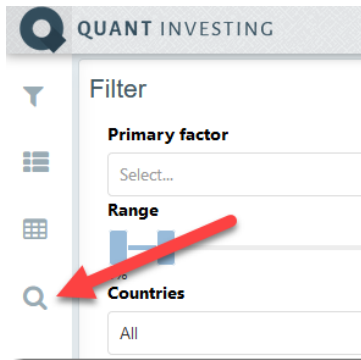
To do this click on the top left **Filter** icon:

Find a specific company in the screener

If you want to find more information about a company, for example its valuation or Piotroski F-Score this is easy to do.
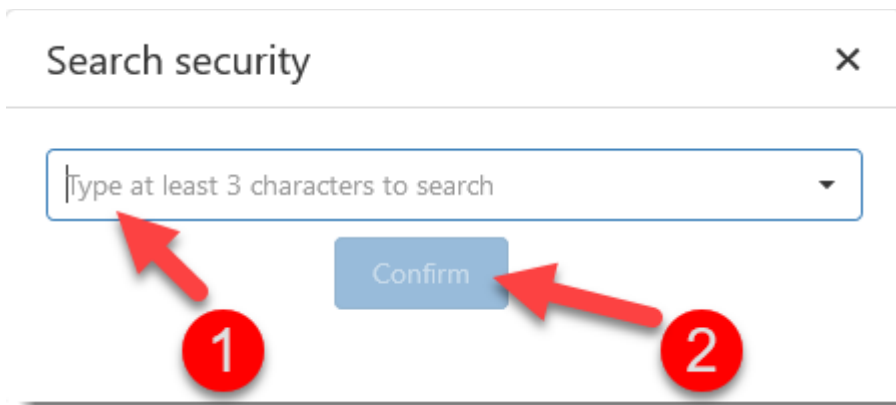
Click on the Search security icon.

As soon as you start typing the company's name in the search box a list of names that fit with what you have typed will appear below the box.
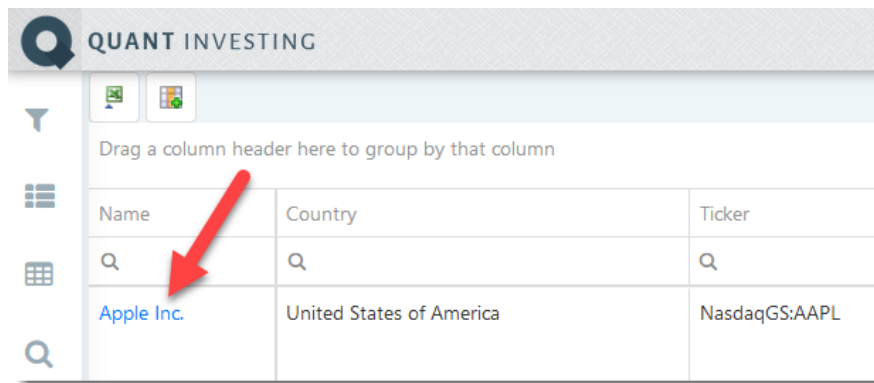
If the company you are looking for does not appear, just keep typing.

Once you have selected the company you are looking for click the **Confirm** button.

How to get more information on a company

If you look at the results of any Filter you will see the company's name is written in blue – this is because it is a hyperlink you can click on to get more information on the company.

After you clicked on the company name a page will open with a lot of company specific ratios and indicators.
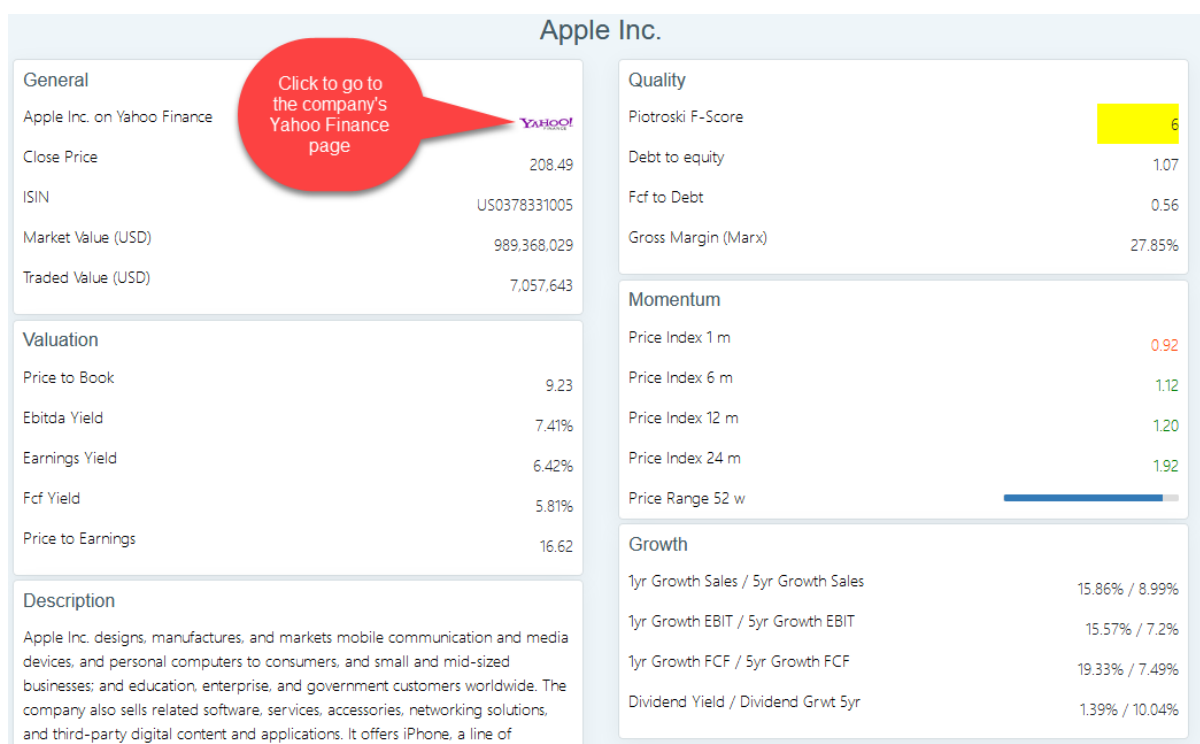
If you ran a filter and clicked on one of the companies the **Ranking** section will show you where the company is positioned within all the companies found with the filter.

The company's ratio and indicator values are shown in bright red.

The ratios and indicators can also be changed by clicking on the drop down lists above each chart.
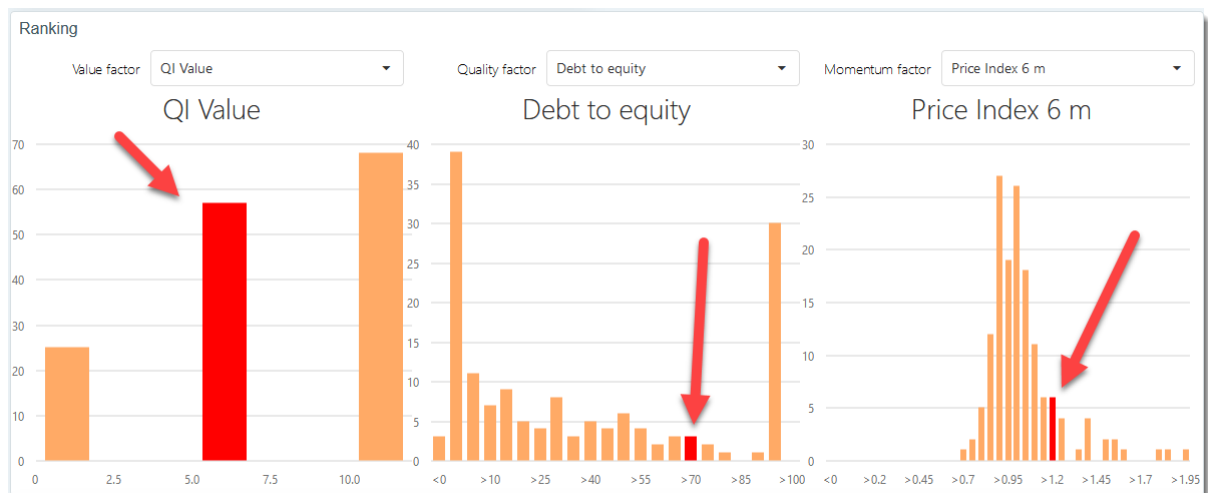
At the bottom of the page you will see a price chart which you can change with the two sliders shown as 1 and 2 below.

To get back to the Filter or the company you called up click the **Back to list** buttons at the **top and bottom** left of the page.
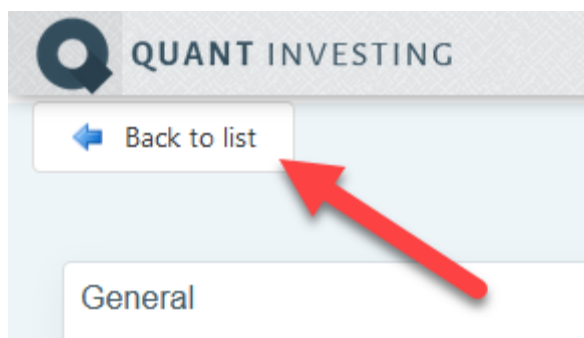
How to create a Watchlist and add companies

A **Watchlist** is a list of companies you select that you can call up with a few mouse clicks.

For example, your own portfolio or companies you would like to keep track of.

You can also select exactly what ratios and indicators are shown when you call up the Watchlist. You do this by saving and loading a **Template**. See the separate section on Templates in this document.
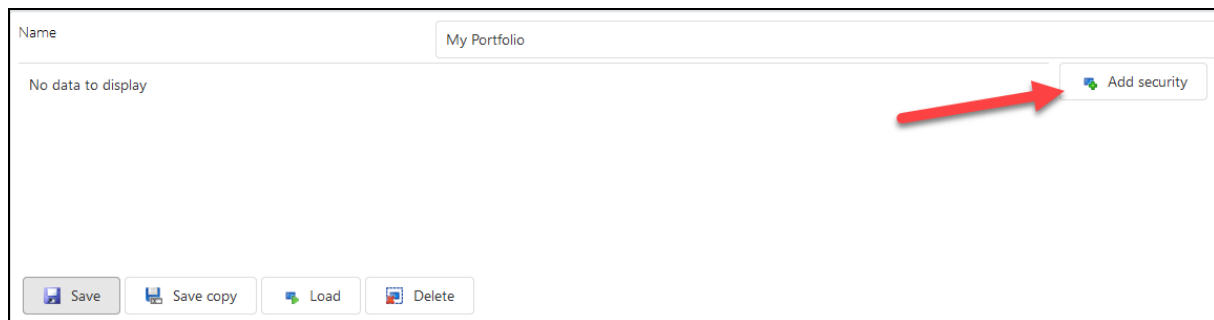
To **create a Watchlist** click on the **Watchlists icon**:
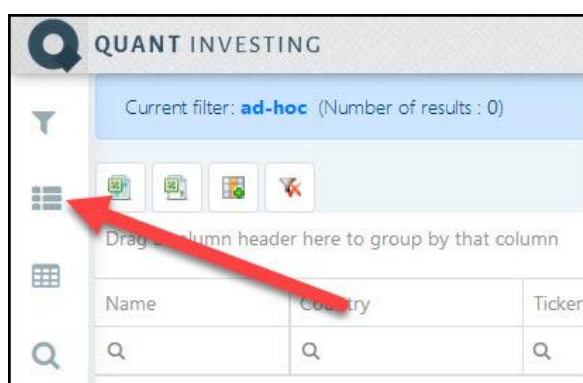
1. click on the **Add watchlist** button,
2. Type in the name you want to give your Watchlist **in the text block** next to **Name**,
3. Click the **Save** button to save your Watchlist
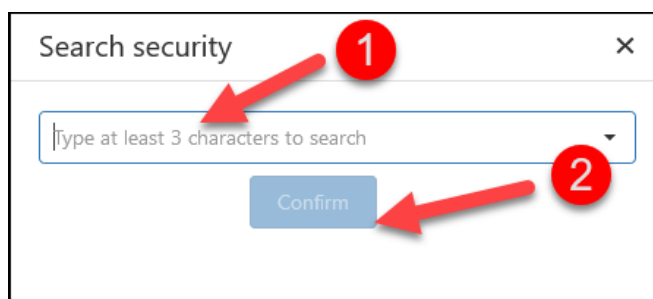

To add a company to your Watchlist click the **Add security** button

Type **at least the first three characters of the company's name** into the search box. A list of matching companies will appear in a drop down list. Keep typing to refine your search.

Once you have found the company you want to add **click on its name** then click the **Confirm** button.
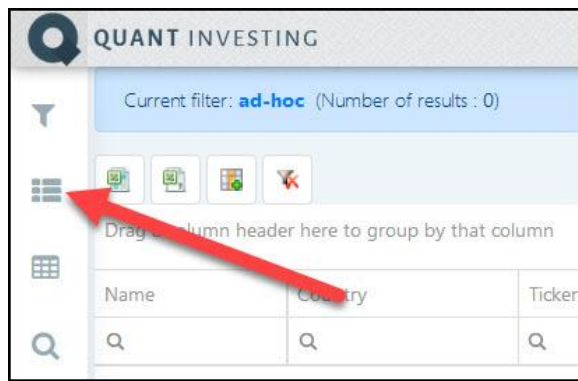

Don't forget to **Save your Watchlist** after you have added all the companies to it.
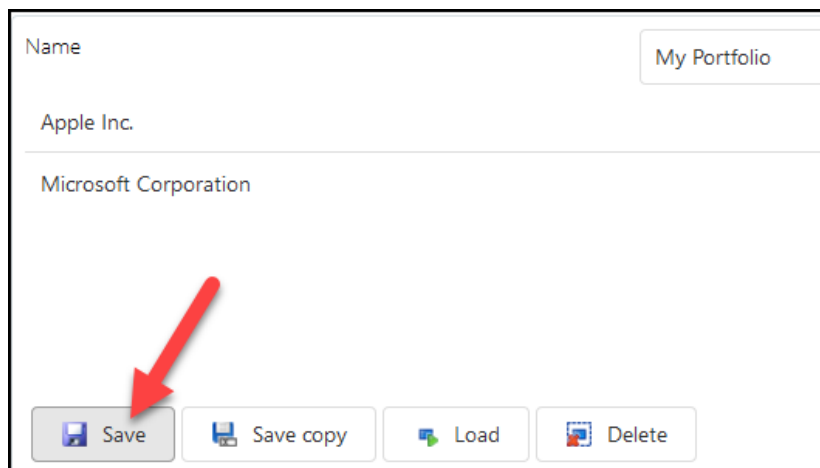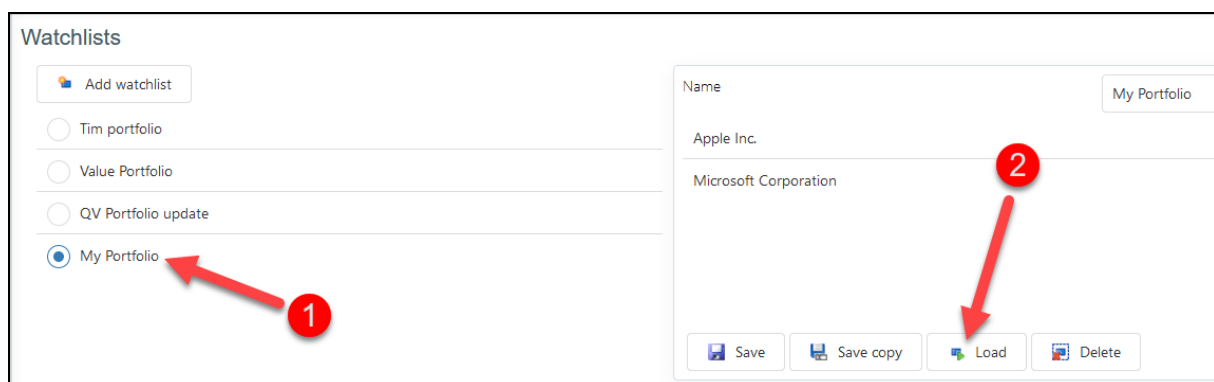

How to load your Watchlist

To open a Watchlist click on the **Watchlist icon**:

Next click on the **name of the Watchlist** you want to load, then click the **Load button**

Your Watchlist will load with the current Template (columns that are displayed) you have selected.
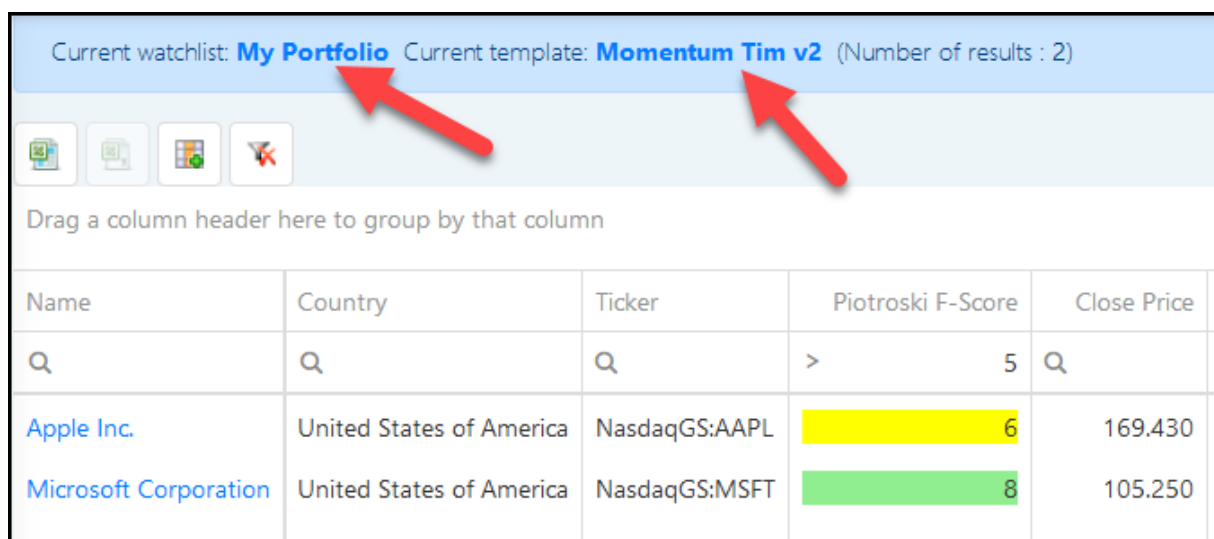
To change the columns that are shown save the columns you want to display in a **Template** and select that Template after loading your Watchlist.

See the separate section on **how to save a Template** on how to do this.

How to edit your Watchlist

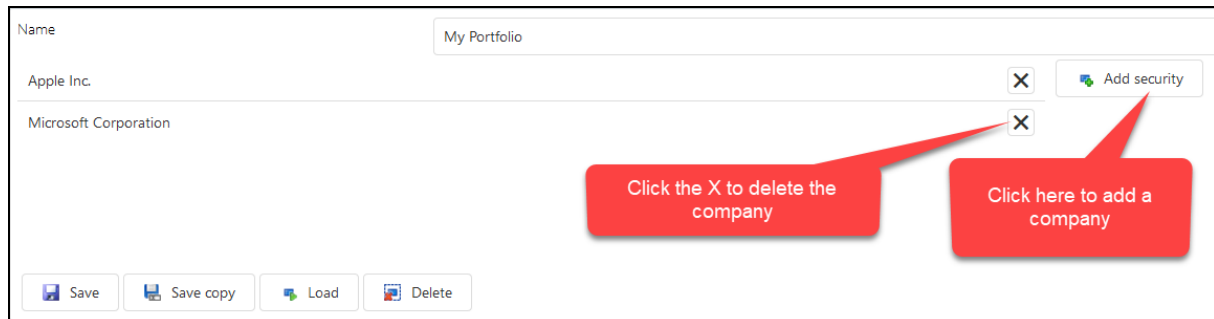Before you can edit your watchlist you have to load it. To do this look at the instructions in the section called **How to load your Watchlist**.

The following image shows you how to edit your watchlist.

Automatic Yahoo Finance link

If you want to do further research on a company that came up in a Filter click on the **Company name.**
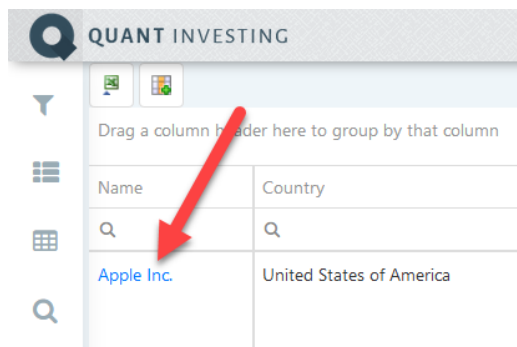
This will open the **company information page.**

To go to the company's Yahoo Finance page **click on the Yahoo Finance logo**.

Note: Not all companies are available on Yahoo Finance, for example Japanese companies.
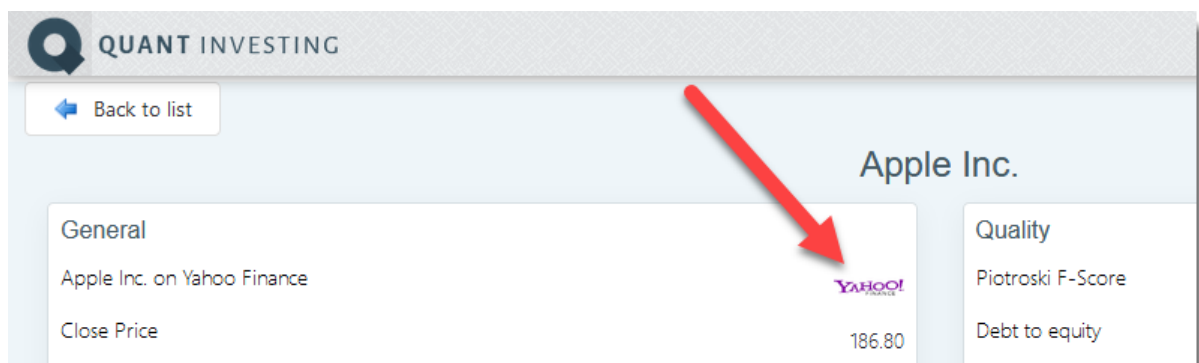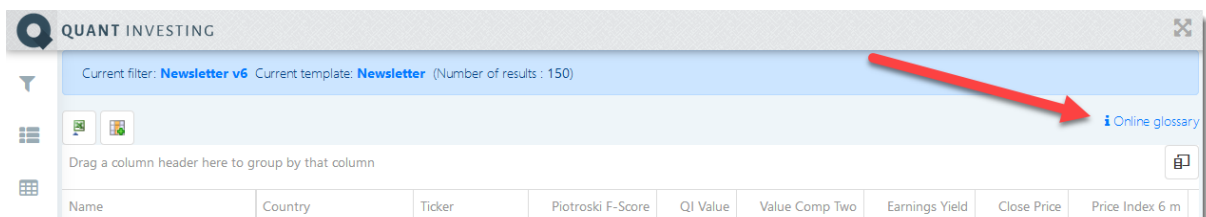
How is a ratio or indicator calculated?

You can easily find information on exactly how all the ratios and indicators included in the screener are calculated or defined.
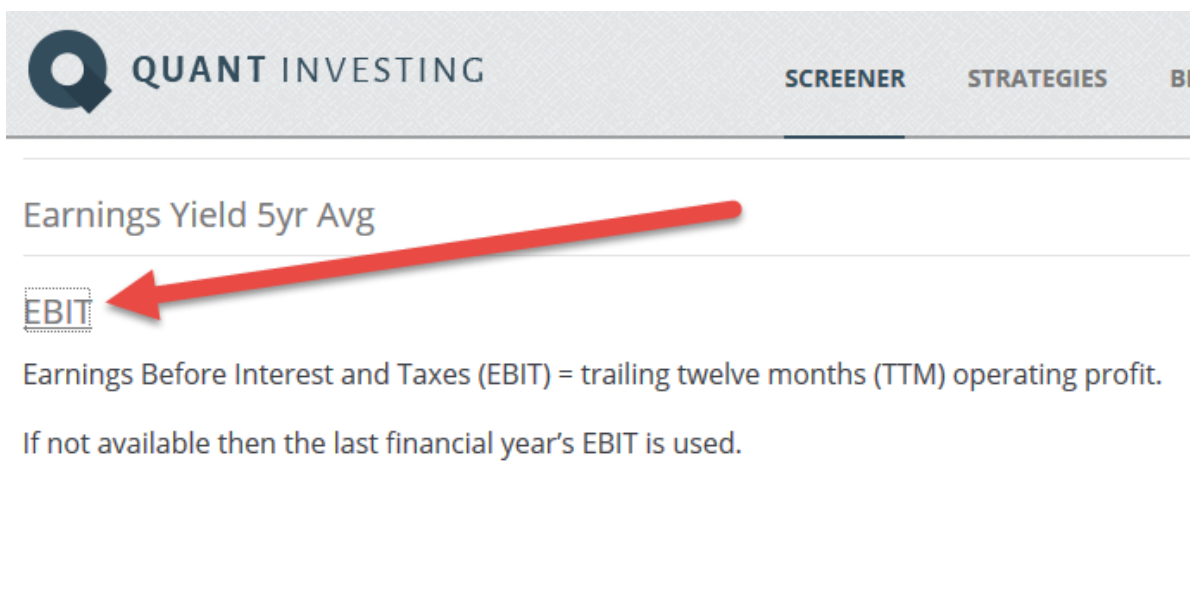
To do that simply click on the **iOnline glossary** link.

That will open a new browser tab that contains an exact explanation of all the ratios and indicators (sorted alphabetically) available in the screener.

To see the definition **click on the ratio or indicator** and the definition will open below it.

In the image below I clicked on **EBIT**:

Use the currencies you know

In the screener I am sure you have seen the currency field.

This field determines what currency the screener uses in the **Daily trading** and **Market capital** fields.

We included the currency field to make it easier for you to select companies using a **currency you are familiar with**.

For example if your investment currency is USD you can specify minimum **Daily trading** and **Market capital** values and then Filter for companies worldwide and only companies with **Daily trading** and **Market capital** values greater the USD values you selected will show up on the screener.

Important: The **Currency** field does not have any other impact on the screener.
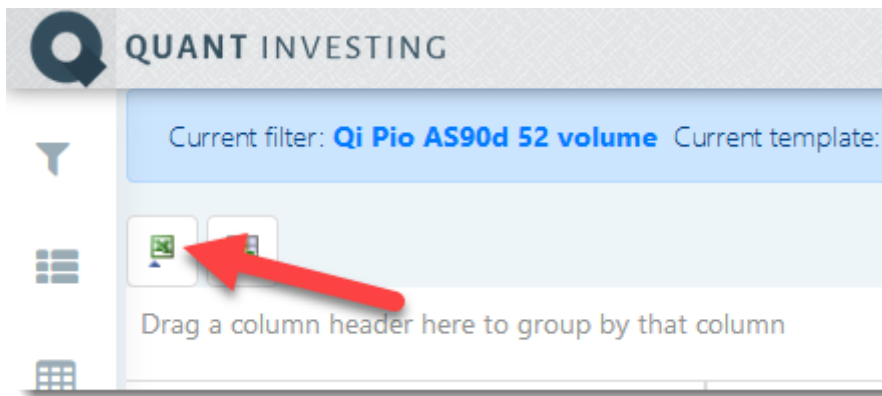
Export to Excel

The screener also allows you to export the results of any Filter you have put together to Microsoft Excel.

Before you can export to Excel you first have to put a Filter together and click on the **Apply** button to get the results.

To export to Excel do the following:

Click the **Export to MS Excel icon**.

Once you have done that the page will either open in Excel automatically or you will have to select **Open with Microsoft Excel** from a menu that will open in your browser.
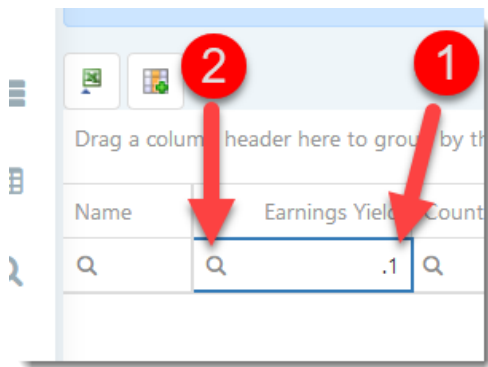
How to filter a column

You can easily filter the contents of just about all columns.

Before you can filter you have to call up your favourite screen.

For example, if you only want to see companies with an **Earnings Yield** greater than 10% this is what you do.

Type .1 (=10%) in the box just below the header **Earnings Yield**, then click on the small funnel to the left of the box.

After you have clicked on the funnel, click **Greater than** on the menu that opens.

As soon as you have done that you will only see the companies with an **Earnings Yield** greater than 10%.

How to sort a column

To sort the values of a column from **high to low** or **low to high** put your cursor in the middle of the column heading and left mouse click on the column heading.

If you click once the column values will be **sorted from low to high**.

If you click a second time the column will be **sorted from high to low**.