

# How Stockopedia can help your investing process

Orientation Webinar



# Ed Page Croft, CFA

Co-Founder & CEO, [Stockopedia.com](https://www.stockopedia.com)

ex-GS Private Clients, Oxford Scholar

 @edcroft

# Comprehensive stock market insight platform for DIY Investors

- Engage with a smart community
- Validate your stock ideas
- Identify portfolio risks
- Discover new opportunities
- Learn & improve your strategy

The screenshot displays the Stockopedia website interface, which is a comprehensive stock market insight platform. The layout is organized into several key sections:

- Header:** Includes the Stockopedia logo, a search bar for over 63,000 stocks, and a 'UK focus' dropdown menu.
- Today:** A central section for market data, featuring:
  - Markets:** Buttons for 'ALL INDICES' and 'ALL SECTORS'.
  - Index Performance:** Summary cards for FTSE All Share Index (€4,376.78, +0.16%), FTSE 100 Index (€8,004.92, +0.09%), FTSE 250 Index (€20,252.97, -0.4%), and FTSE AIM All Share Index (€870.27, +0.09%).
  - Index technicals:** A line chart showing SMA (50) and Volume from Jan 2 to Feb 13. Summary statistics include: Advancers: 385, Decliners: 124, #52w Highs: 26, #52w Lows: 1, Above 200dma: 361, Below 200dma: 155.
  - Index statistics:** P/E Ratio (12.8), Div. Yield (3.7%), and EPS Growth (5.4%).
  - Decliners Table:** A table listing declining stocks with columns for Name, % Change, and StockRank™. Examples include Bank of Georgia (+7.0%), Devro (+6.5%), JPMorgan US Smaller Comd (+5.6%), Centrica (+5.2%), and Georgia Capital (+4.9%).
- Research:** A section for 'ALL DISCUSSIONS' featuring a 'Small Cap Value Report (Thu 16 Feb 2023) - IHC, CKT, HOME, CREO' by Paul Scott. The report includes an image of two men and text stating: 'Good morning from Paul and Roland! Explanatory notes - A quick reminder that we don't recommend any stocks. We aim to review trading updates & results of the day and offer our opinions on them as possible candidates for further research if they interest you. Our opinions will sometimes turn out to be right, and...'
- News:** A section for 'Folio news' (219 items) and 'All today's news' (128 items).
- My Folios:** A section for 'SEE ALL' folios, showing 'NAPS Portfolio' (€279,207.02) and 'ii - 55' (€118,534.14, -3.35%).
- Community:** A sidebar on the right lists recent discussions, such as 'Angling Direct: Fishing for Value' by Mark Simpson and 'Small Cap Value Report (Wed 15 Feb 2023) - GATC, PIER' by Graham Neary.

# Comprehensive stock market insight platform for DIY Investors

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The screenshot displays the Stockopedia website interface. At the top, there's a search bar for over 63,000 stocks and a 'UK focus' dropdown. The main content is divided into several sections:

- Today:** Shows market indices like FTSE All Share Index, FTSE 100 Index, FTSE 250 Index, and FTSE AIM All Share Index with their respective values and percentage changes.
- Markets:** Includes a line chart for SMA (50) and Volume, and technical indicators such as Index technicals (Advancers: 385, Decliners: 124) and Index statistics (P/E Ratio: 12.8, Div. Yield: 3.7%, EPS Growth: 5.4%).
- Research:** Features a 'Small Cap Value Report (Thu 16 Feb 2023) - IHC, CKT, HOME, CREO' by Paul Scott, with a photo of two men.
- Community:** Lists discussions like 'Angling Direct: Fishing for Value' by Mark Simpson and 'Small Cap Value Report (Wed 15 Feb 2023) - GATC, PIER' by Graham Neary.
- News:** Shows 'Folio news' (219) and 'All today's news' (128).
- My Folios:** Displays portfolio performance for 'NAPS Portfolio' (£279,207.02) and 'ii - 55' (£118,534.14, -3.35%).

- 1 Founding Principles
- 2 Engaging with the community
- 3 Validating your stock ideas
- 4 Identifying portfolio risks
- 5 Discovering new opportunities
- 6 Repeating for confidence & results

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It is very important to do your own analysis before making any investment based on your own personal circumstances. You should take independent financial advice from a professional in connection with or independently research and verify any information you find in this presentation. Accordingly we will not be liable, whether in contract, tort (including negligence) or otherwise, in respect of any damage, expense or a loss you may suffer arising out of such information or any reliance you may place upon such information.

We would like to draw your attention to the following important investment warnings:

- The value of shares and investments and the income derived from them can go down as well as up
- Investors may not get back the amount they invested
- Past performance is not a guide to future performance

Please note that all data in this document is historic and dated when this document went to print in February 2023.

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# Founding Principles

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# One of my early journal items!

MEDORO RESOURCES

BUY/DATE Average 40 $\frac{3}{4}$  3/3/04.

SELL/DATE

% Loss -82% -90% +

Purchase Reasons  
Tip from [redacted]. It related under another name & [redacted] said there was a market anomaly & I stupidly bought it. Then I averaged down.

Sell Reasons

Mistakes Made  
Lessons learned  
Don't buy on tips or rumours.  
Don't buy small companies with no earnings.  
Don't average down.  
Use a stop loss. @ 10 or 15% max.

Sardinian Gold Miner

90% Loss.

Bought on a tip.

Don't buy on tips or rumours!

Don't buy stocks with no earnings.

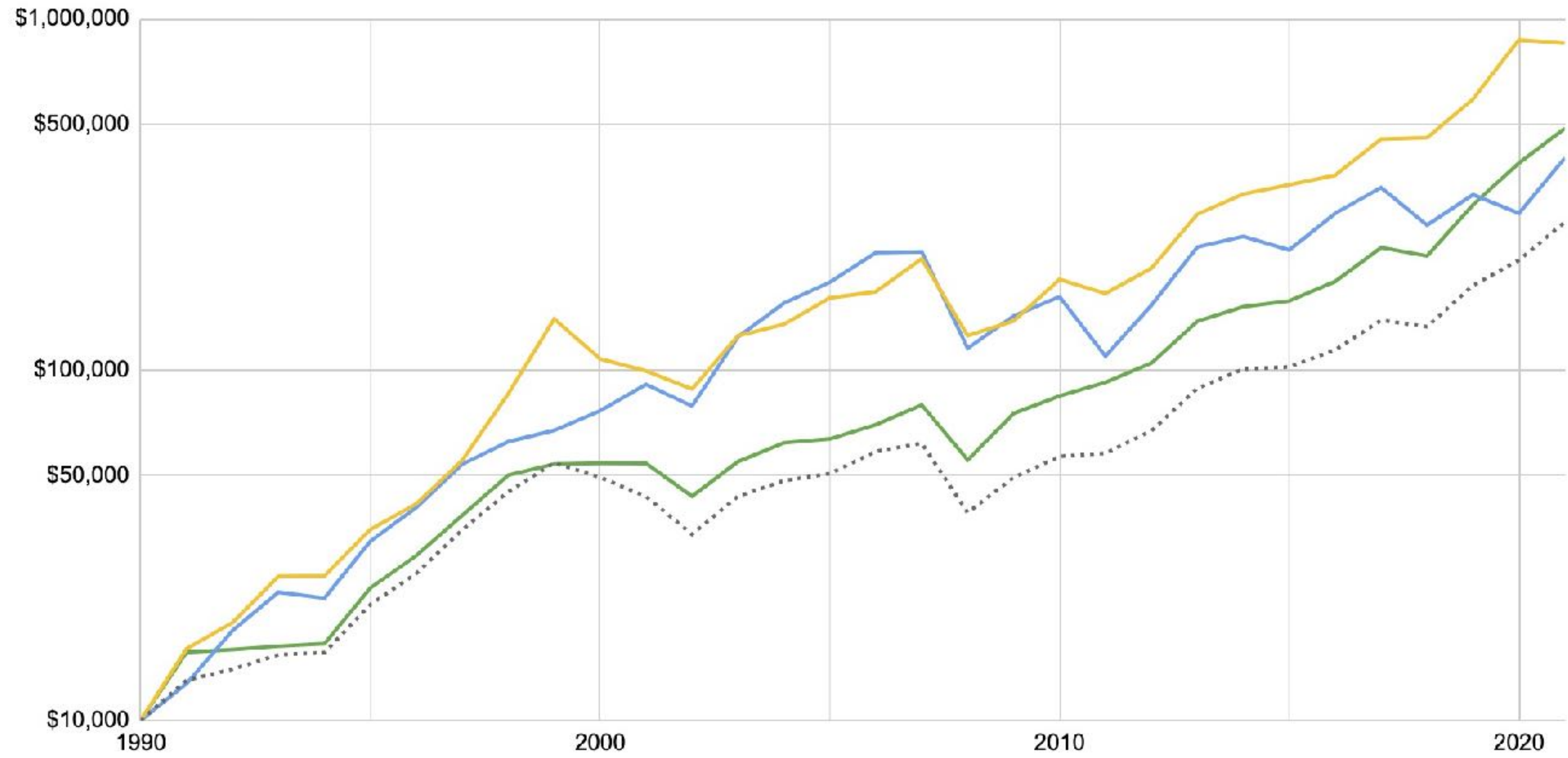
Don't average down. Use a stop loss.





# Stock returns are driven by quality, value and momentum

Quality Value Momentum S&P 500



Fama & French  
Nobel Prize  
Winning Academics

Fama & French [Data Library](#)

**We don't tip stocks**

We help you apply “what works”

# Education, Community & Data Insights to empower you as a DIY investor

**Reduce guesswork**  
**Make data-backed decisions**  
**Gain discipline & results**

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# Our extensive editorial team



**Megan Boxall**

Editor. FTSE & Education.  
Ex IC. CFA L1.



**Paul Scott**

Small Cap Report  
ex Finance Director



**Graham Neary**

Small and Mid Caps  
ex Fund Manager



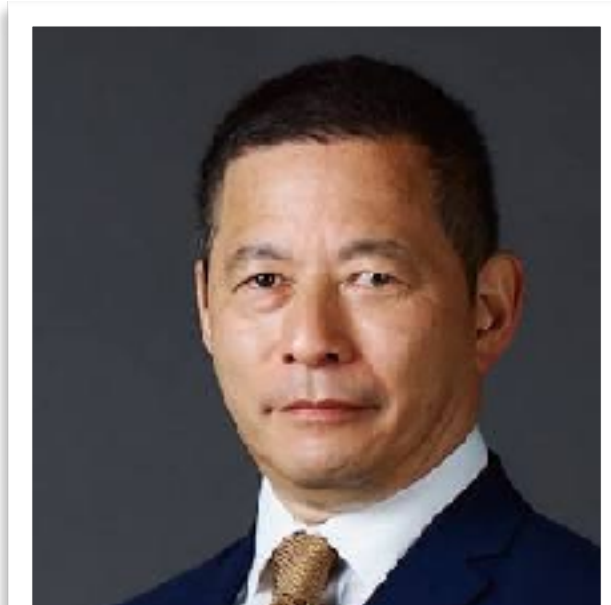
**Roland Head**

Stock Analysis & Screening  
IMC. CFA L1



**Mark Simpson**

Stock Analysis & Screening  
Author Excellent Investing.



**Ed Shing**

Market Analysis  
CIO BNP Paribas Wealth Mgmt



**Chris Batchelor**

Australian Equities  
Stockopedia Oz. CFA.



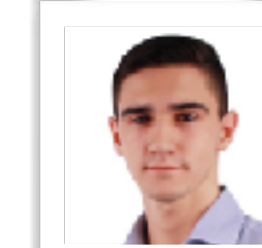
**Elio d'Amato**

Australian Equities  
Stockopedia Oz. CFA.



**Alex Naamani**

Data Research Insights. CFA L1.



**Keelan Cooper**

Research Analyst. BSc Banking & Finance.



**Ed Page Croft**

Stockopedia Founder. CFA.

# The Research Community

Learn about the community on Youtube



<https://youtu.be/5VTeWexh5j8>



# Current publishing includes

- ✓ **Daily Small Cap Value Report** - with a thriving community
- ✓ **Weekly “Stock Pitches”** - research reports on interesting shares
- ✓ **Weekly Screening Features** - ideas from our databases
- ✓ **Weekly Market Wraps & Analysis** - FTSE Fridays & Market Analysis
- ✓ **Model Portfolio** - a systematic approach to investing
- ✓ **Educational articles** - improving your stock analysis and investing

*Including 100+ comments daily from the community - please join in!*

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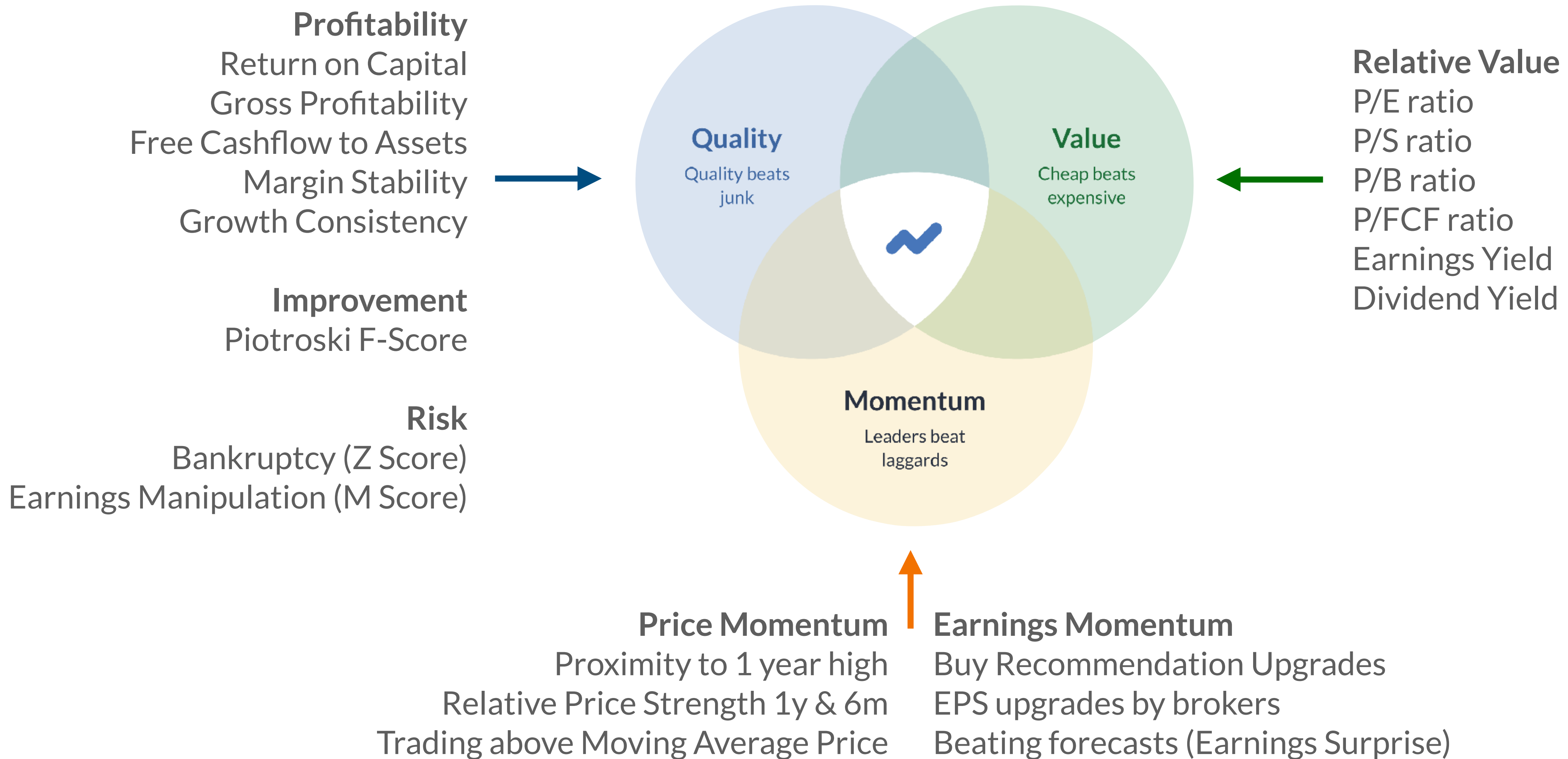
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Discovering new opportunities

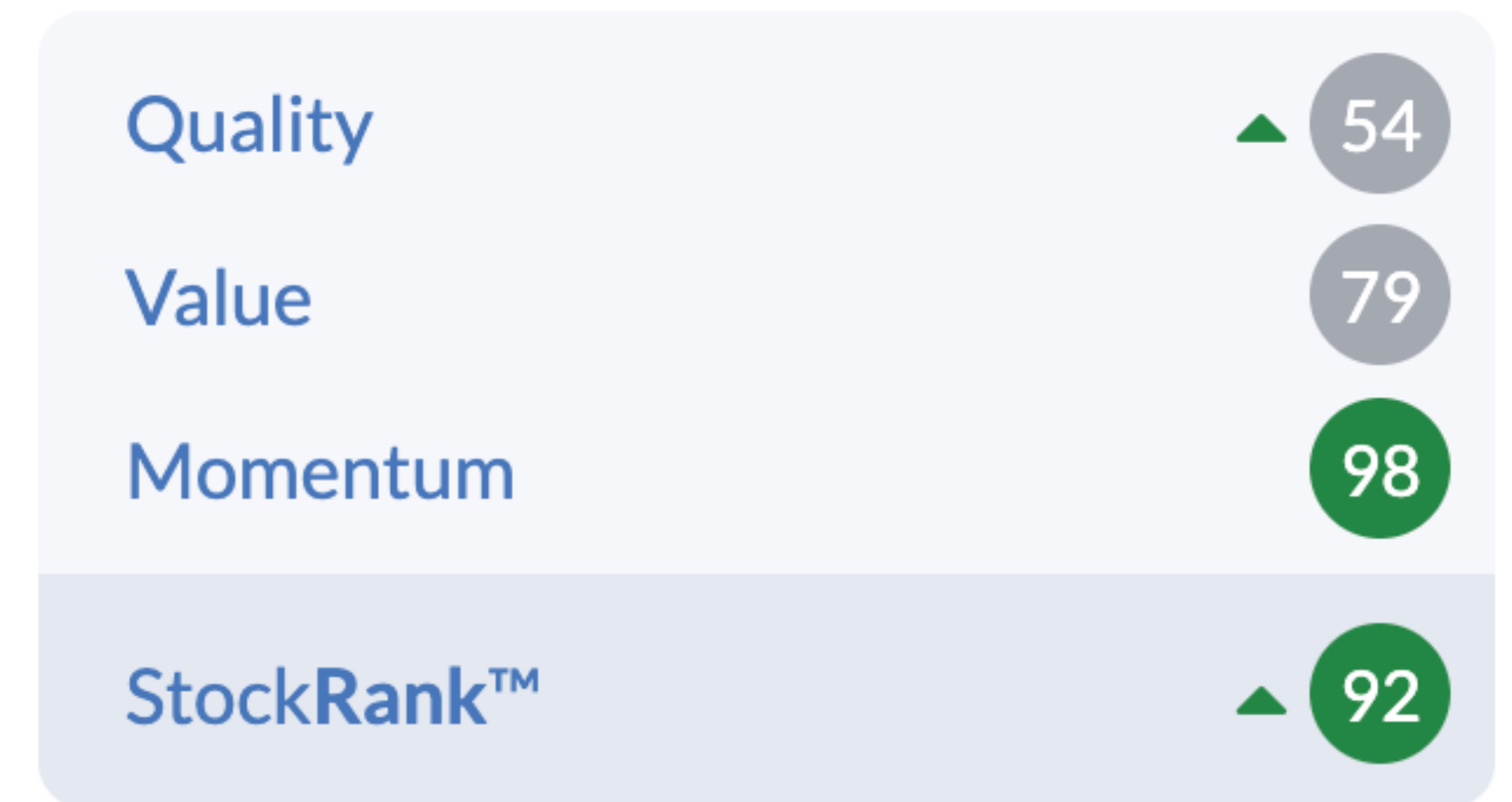
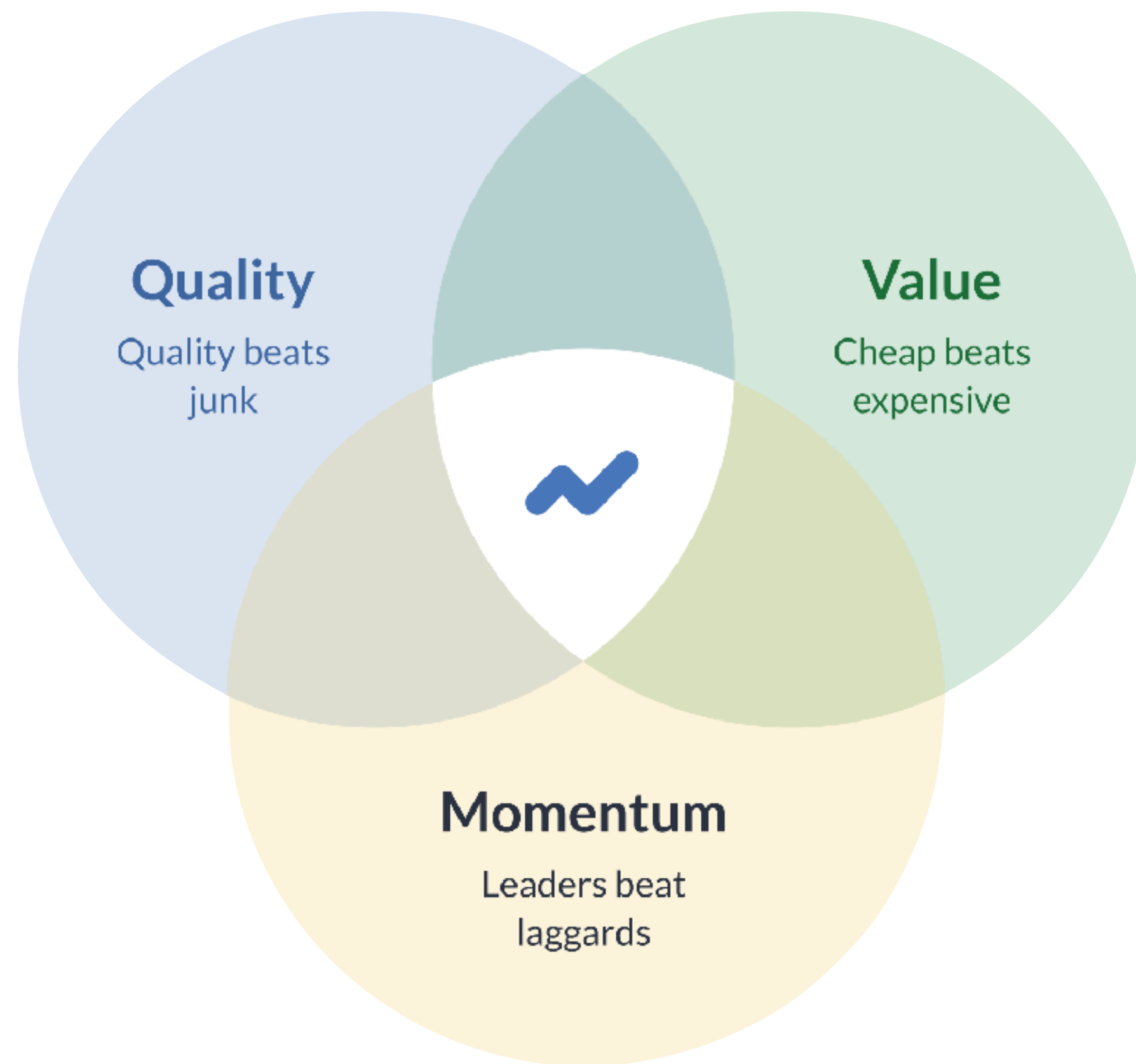
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Repeating for confidence & results

# Assessing shares with the “QVM” framework



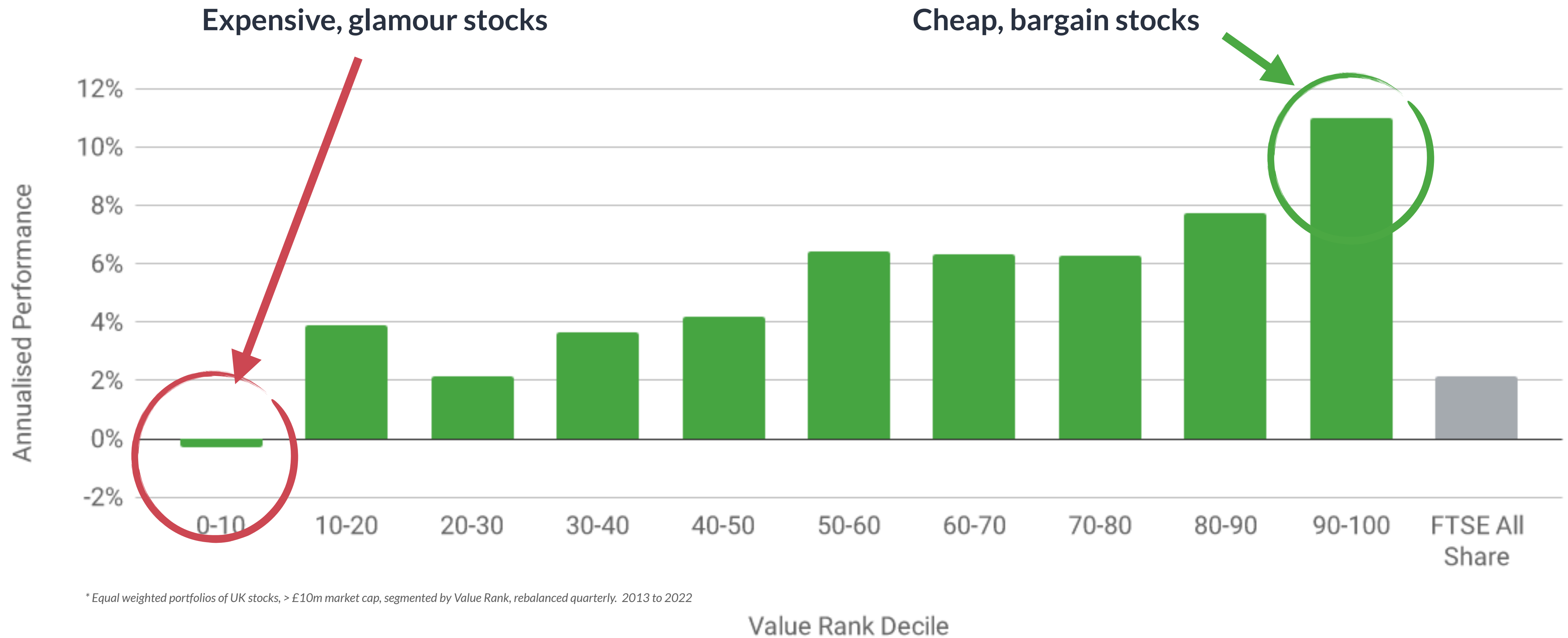
# Assessing shares with the “QVM” framework



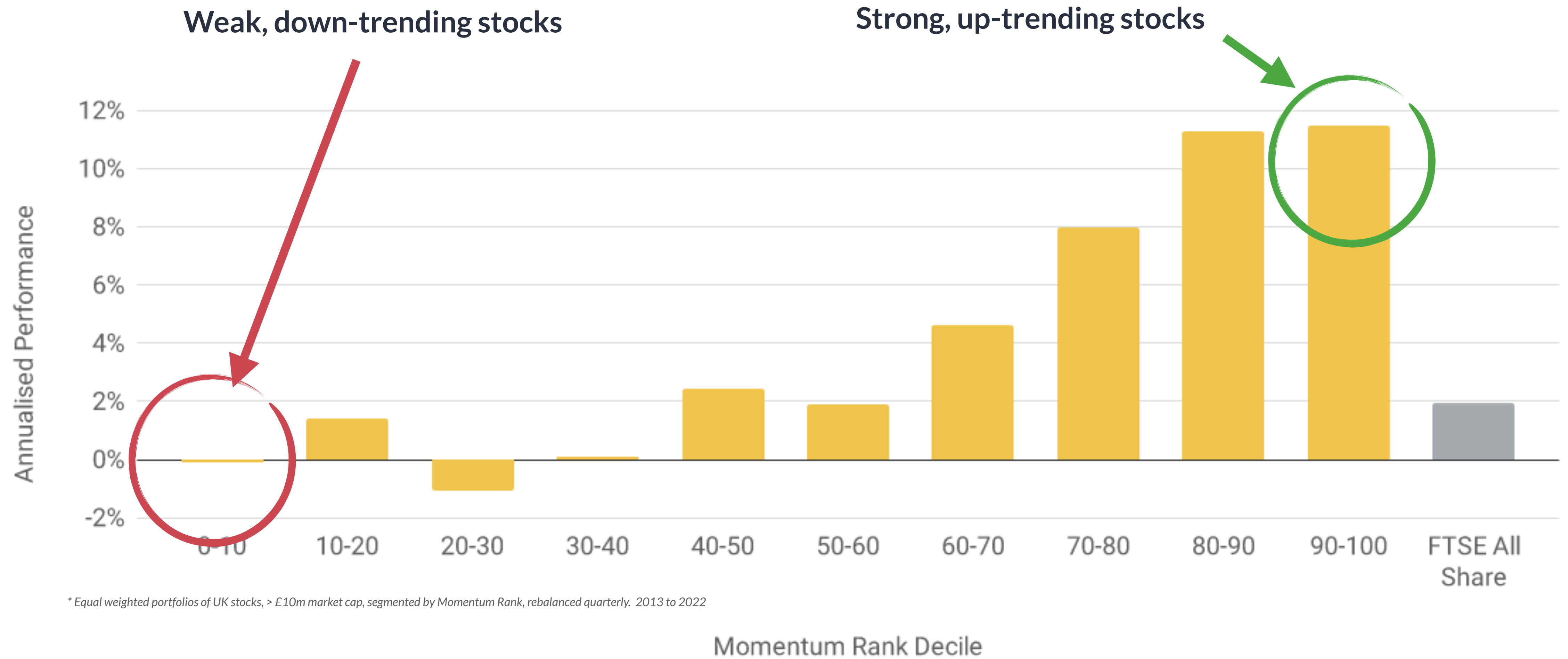
# Quality - “good” beats “junk”



# Value - cheap beats expensive



# Momentum - strength beats weakness



\* Equal weighted portfolios of UK stocks, > £10m market cap, segmented by Momentum Rank, rebalanced quarterly. 2013 to 2022

100

“Good, cheap, strong”

75

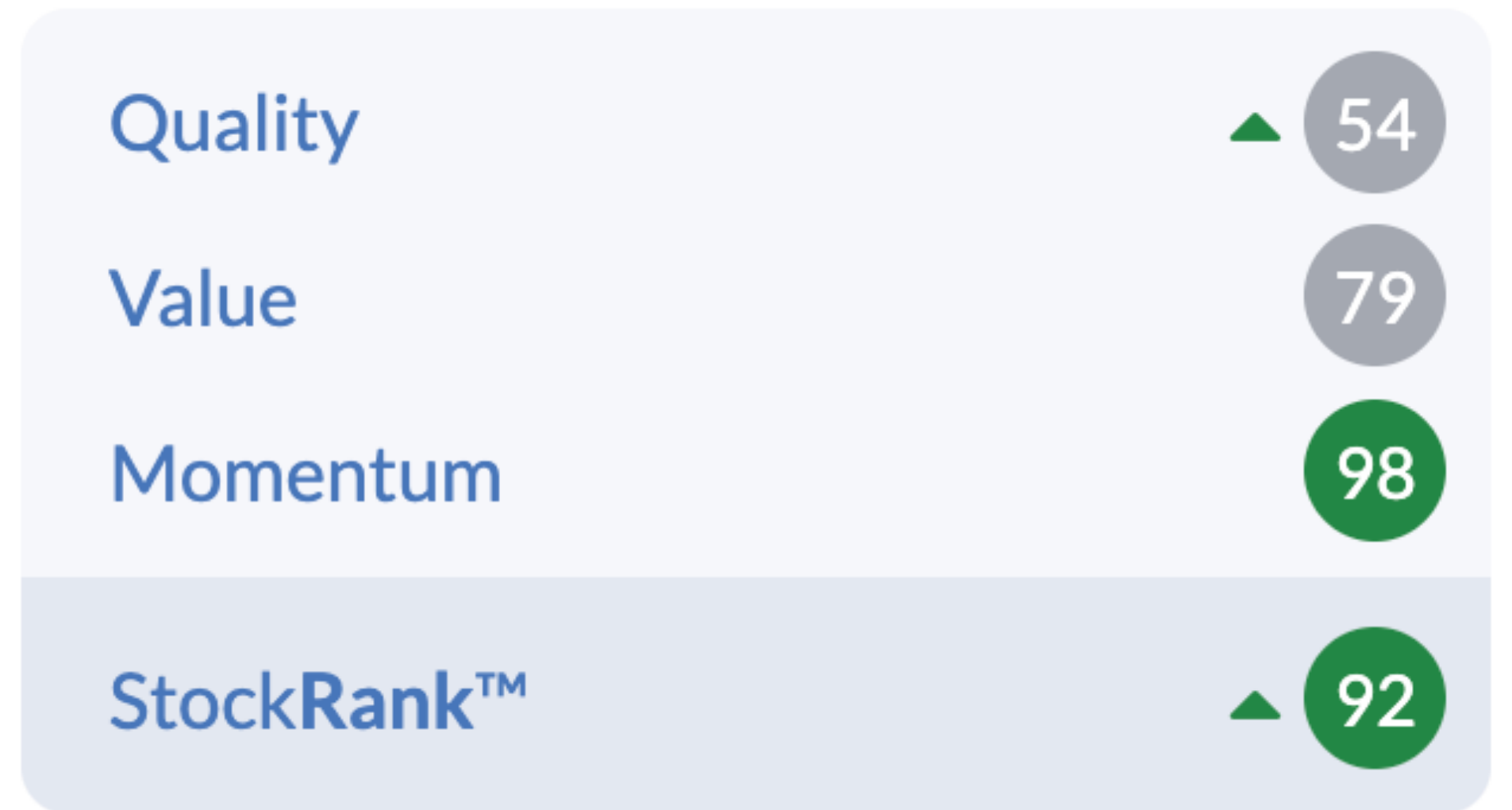
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“Junk, expensive, weak”

## Using the StockRanks







## Using the StockRanks

Quality	84
Value	62
Momentum	63
StockRank™	83



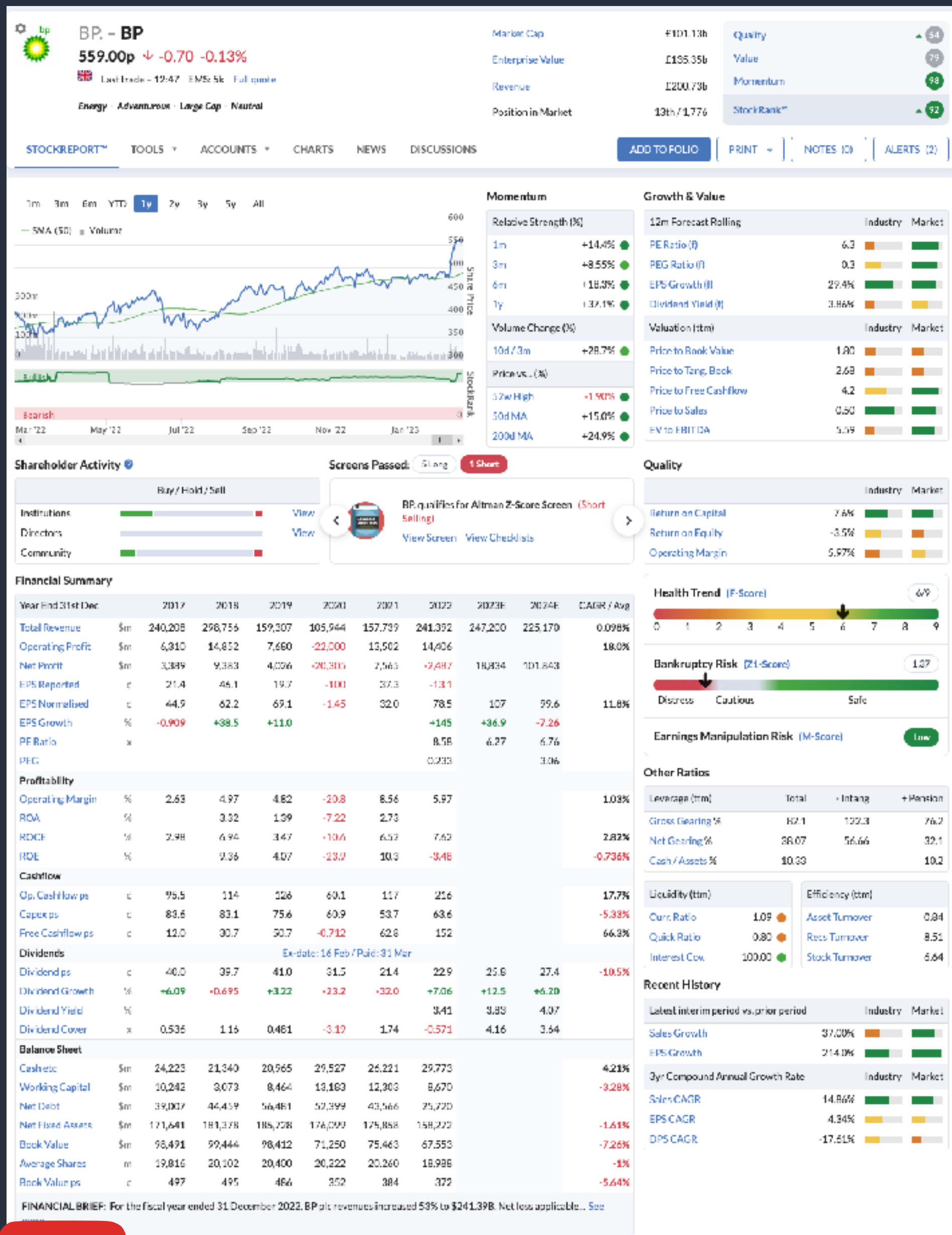
## Using the StockRanks

Quality	43
Value	84
Momentum	▼ 29
StockRank™	▼ 50



## Using the StockRanks

Quality	12
Value	40
Momentum	▲ 33
<b>StockRank™</b>	▲ 18



# StockReports

- Packed with comprehensive intelligence
- Fundamental & Technical Analysis
- Analysts forecasts
- Major Shareholder & Director Deals

*“Gloriously designed - the individual company pages on Stockopedia are absolute delight and incredibly easy to read.”*



David Stevenson,  
Adventurous Investor



# The StockReports

Learn about the StockReports on Youtube



<https://youtu.be/XpJARkEQLeK>

# Unique share assessment depends on your goals

- **Growth Investors** - Earnings & Sales Growth (+ quality, momentum)
- **Value Investors** - Low valuation (+ momentum and/or quality)
- **Dividend Investors** - High Yield (+ quality, dividend safety)

Learn more in our extensive “**StockReport Webinar**”

<https://event.webinariam.com/go/replay/61/m0ry4iz2aoot0o9ag>



# In their own words

Hear how ex-Fund Manager, Ted Scott, uses Stockopedia



<https://youtu.be/skxHUFuU4nY>

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# ⚠️ Three common portfolio risks

1. Overconfident position sizing



2. Owning only speculative stocks



3. Lack of sector diversity



**Diversifying across sectors, sizes & styles  
creates a more resilient portfolio**

# Select stocks from different sectors

A 10 level classification based on every stock's economic sector.

## Defensives

- Healthcare
- Consumer Defensive
- Utilities

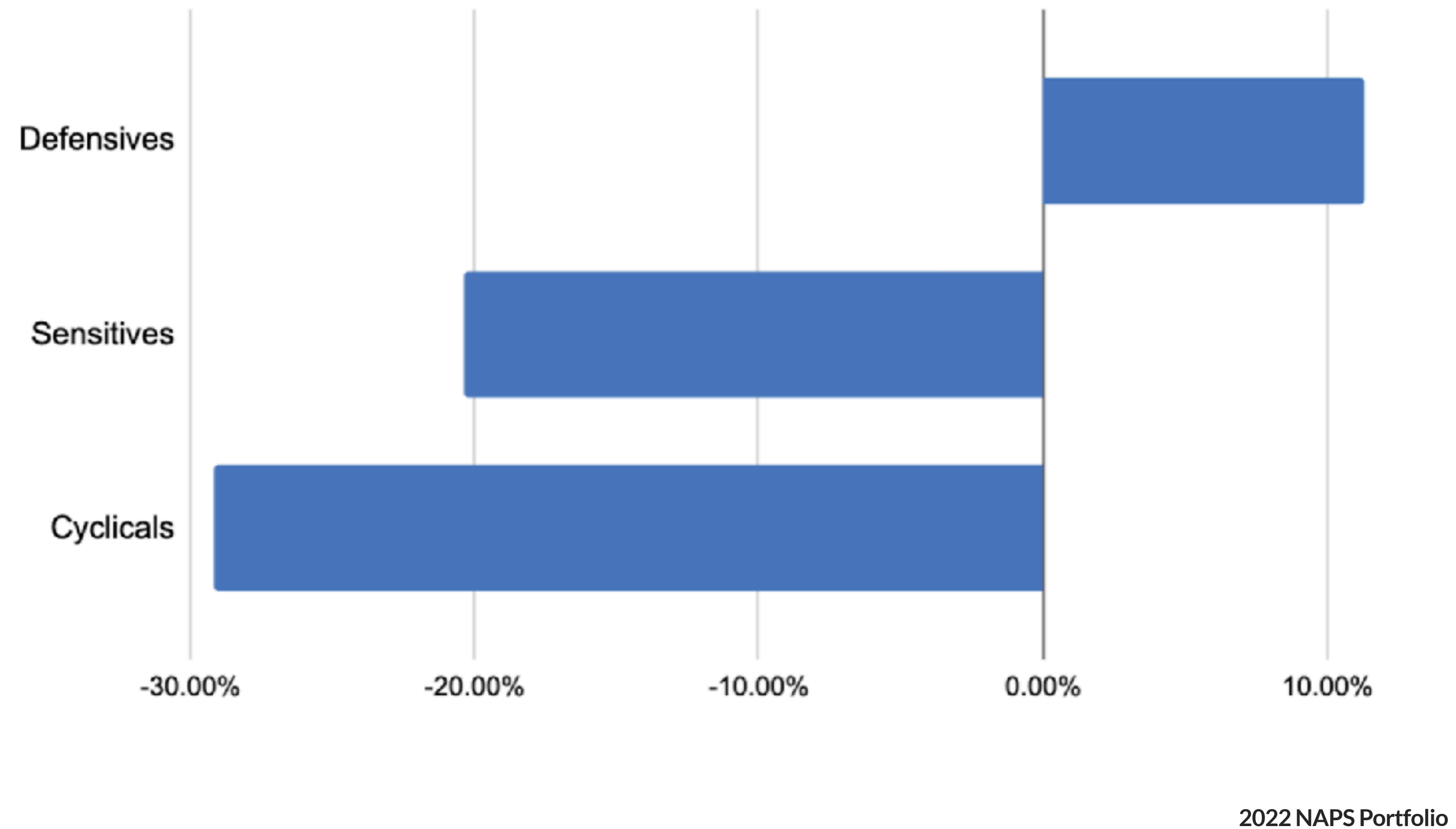
## Sensitives

- Industrials
- Energy
- Telecoms
- Technology

## Cyclicals

- Basic Materials
- Consumer Cyclical
- Financials

# Bear Market - Defensives brought spine to the NAPS



## Defensives

- Healthcare
- Consumer Defensive
- Utilities

## Sensitives

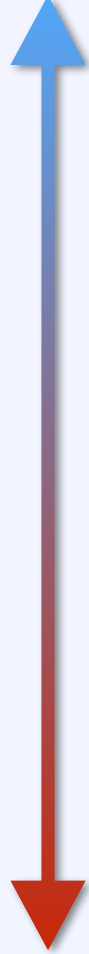
- Industrials
- Energy
- Telecoms
- Technology

## Cyclical

- Basic Materials
- Consumer Cyclical
- Financials

# RiskRatings - how speculative are your picks?

A 5 level classification based on a every stock's annual volatility.

Classification	Annual Volatility	
<b>1. Conservative</b>	<b>&lt; 25%</b>	 Low Risk
<b>2. Balanced</b>	<b>25% - 35%</b>	
<b>3. Adventurous</b>	<b>35% - 45%</b>	
<b>4. Speculative</b>	<b>45% - 70%</b>	
<b>5. Highly Speculative</b>	<b>&gt;70%</b>	
		High Risk

*NB - Risk defined as upside and downside risk,  
rather than the pure risk of capital loss.*



# The Folios

Learn how to use the portfolio tools on Youtube



<https://youtu.be/B4K0UwTcUD8>

Learn more in our extensive “**NAPS Portfolio Webinar**”

<https://event.webinarjam.com/go/replay/47/44og5sqli6vfvv2s6>

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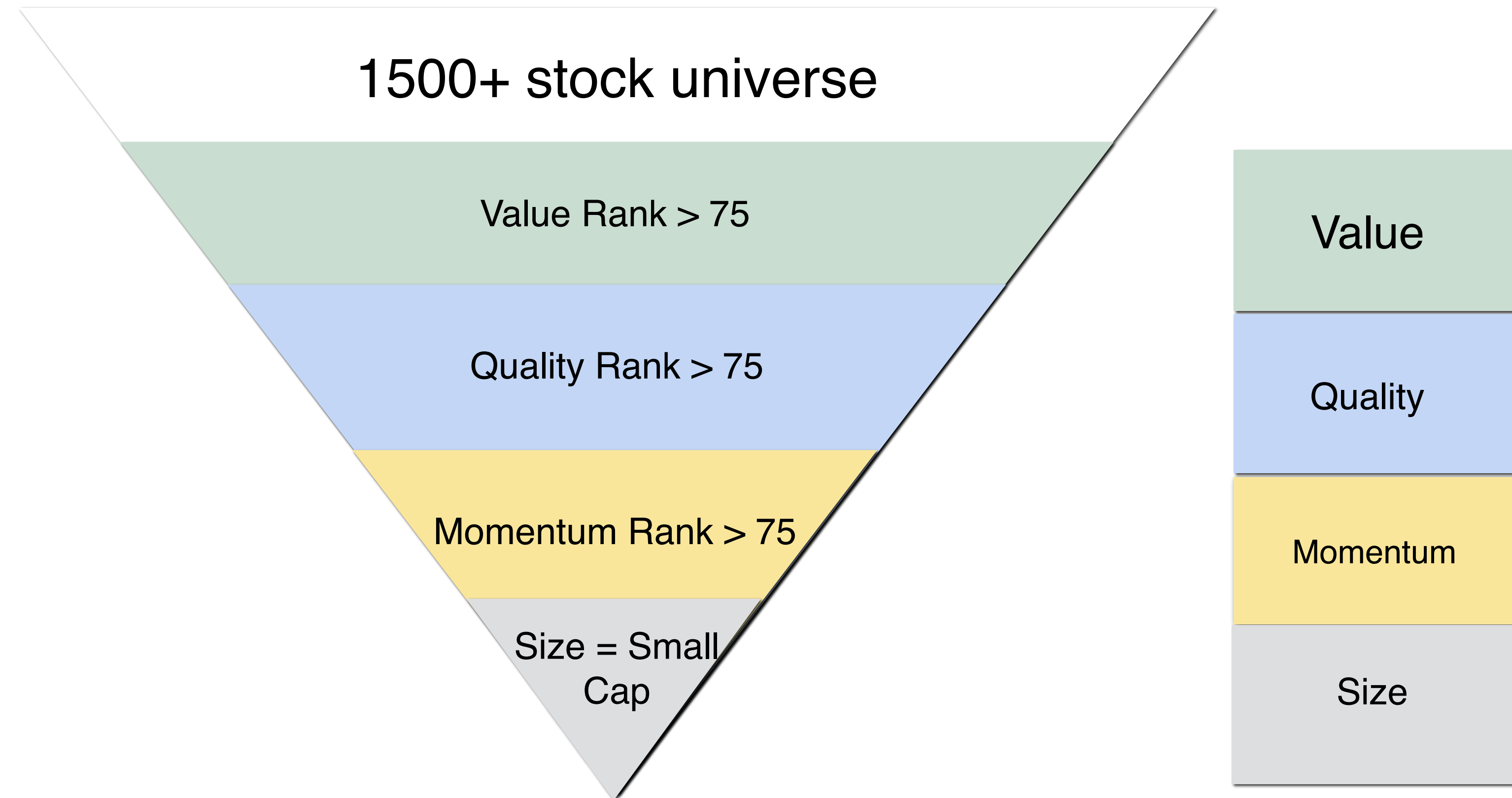
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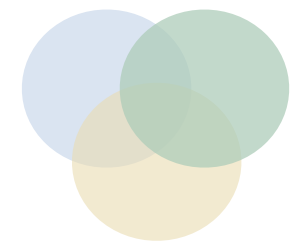
# The benefits of screening a database for ideas

Narrow a broad universe of stocks using financial ratios...



...to a small set of (17) candidate stocks

# Three ways of screening at Stockopedia



“**Stockopedia Screens**” based on our StockRanks & Ratings



“**Guru Screens**” based on famous investment literature



“**Custom Screens**” based on your own rules



# The Stock Screener

Learn how to use the screening tools on Youtube



[https://youtu.be/3132Zdh-O\\_Q](https://youtu.be/3132Zdh-O_Q)

# Contrarian Investors



"I like buying quality merchandise when it's been marked down."

Warren Buffett

# Bargain Investors



"Try to buy stocks that meet some simple criterion for being undervalued"

Benjamin Graham

# Turnaround Investors



"Trending Value is the most successful strategy since 1963"

James O'Shaughnessy

# Momentum Investors



"The trend is your friend, if you trade against it, the trend becomes your worst enemy."

Mark Minervini

# Quality Investors



"Buy good businesses. Don't overpay. Do nothing."

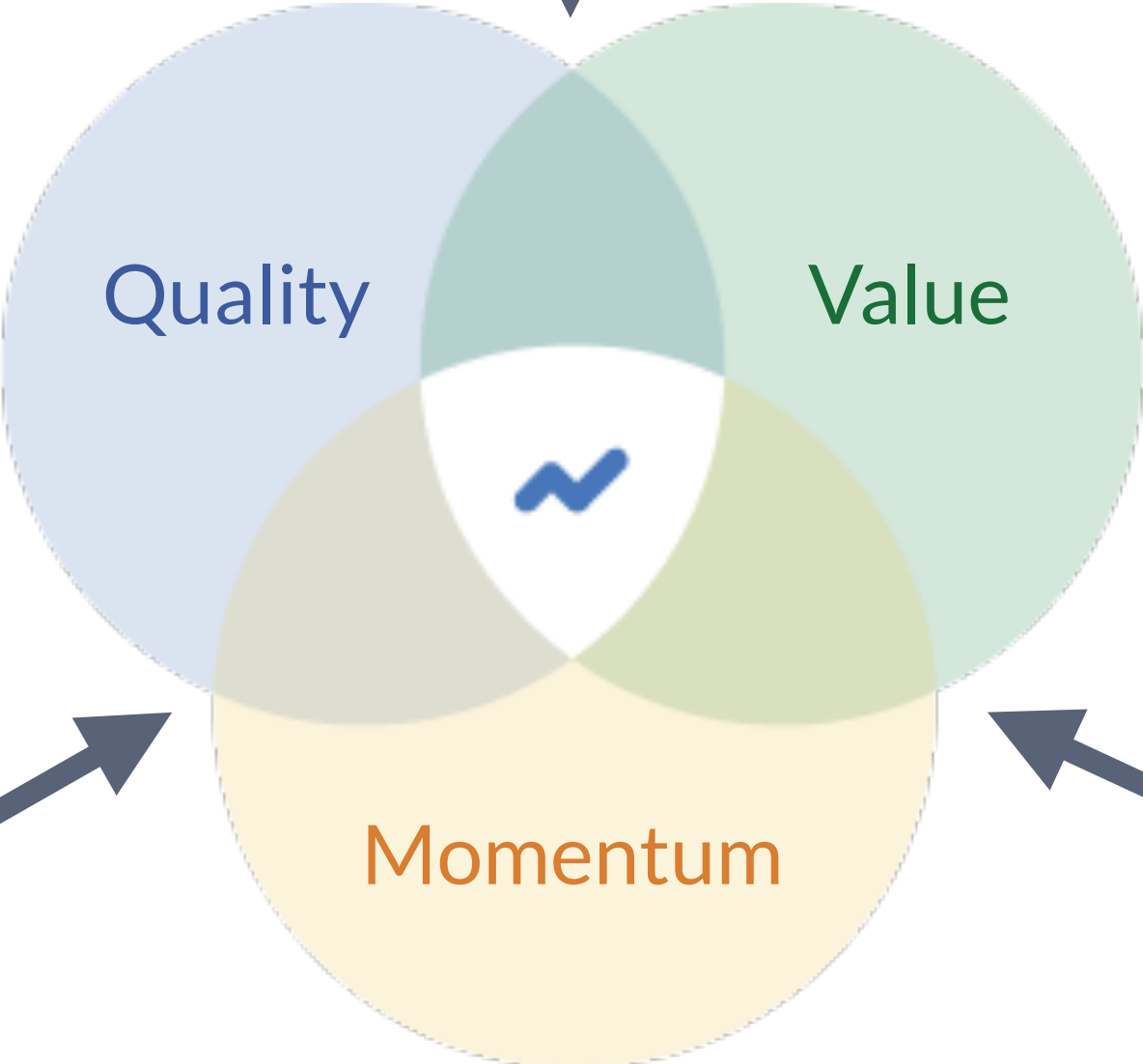
Terry Smith

# Growth Investors



"Charts plus earnings will help you tell the best stocks."

William J O'Neil



Register for our extensive “**Screening Webinar**”

<https://event.webinarjam.com/register/76/w6qz1b7q>

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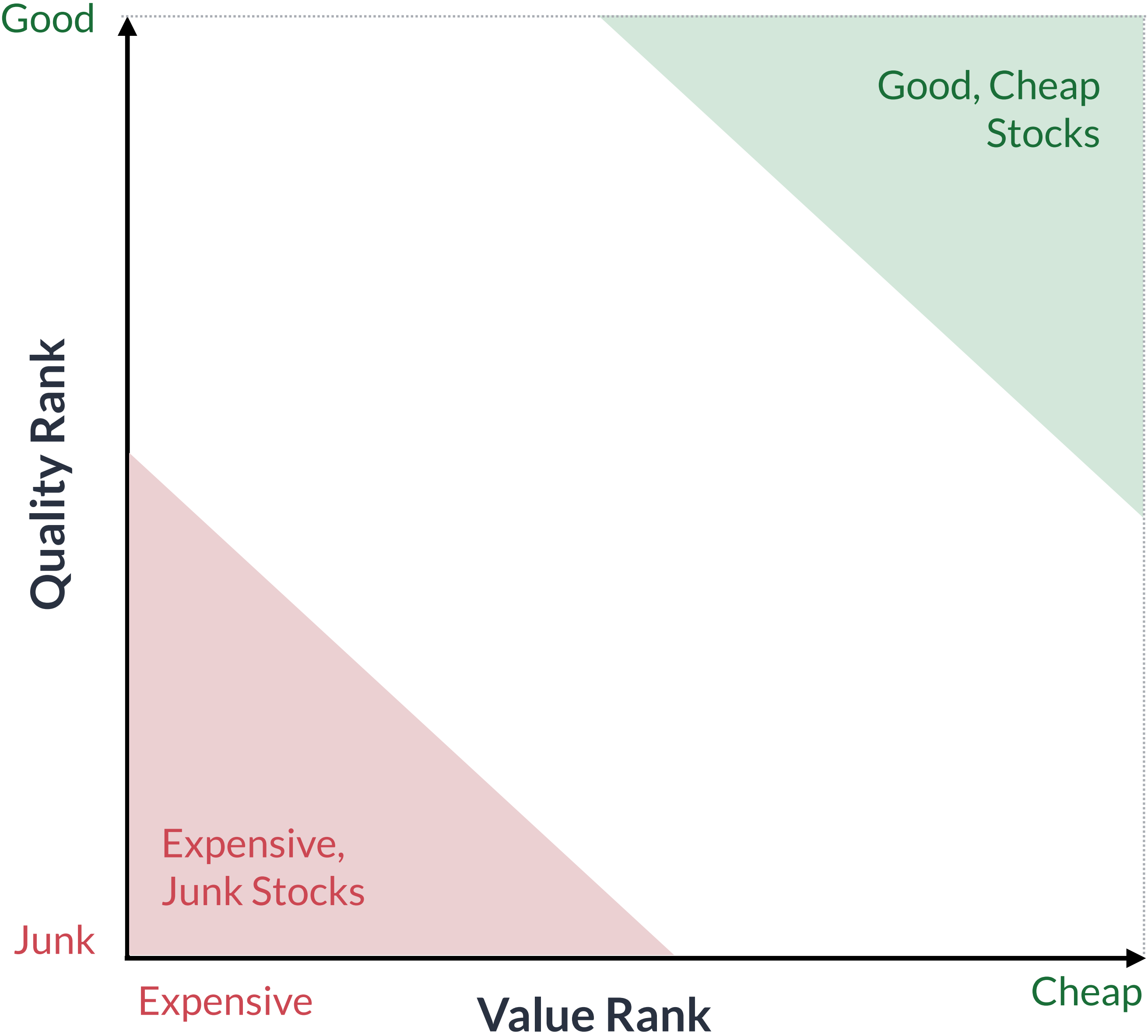
“  
*You sell a good stock that’s performing well when it no longer meets your criteria. I try to buy companies that are special, and sell them when they become ordinary.*  
”



**Jim Slater**

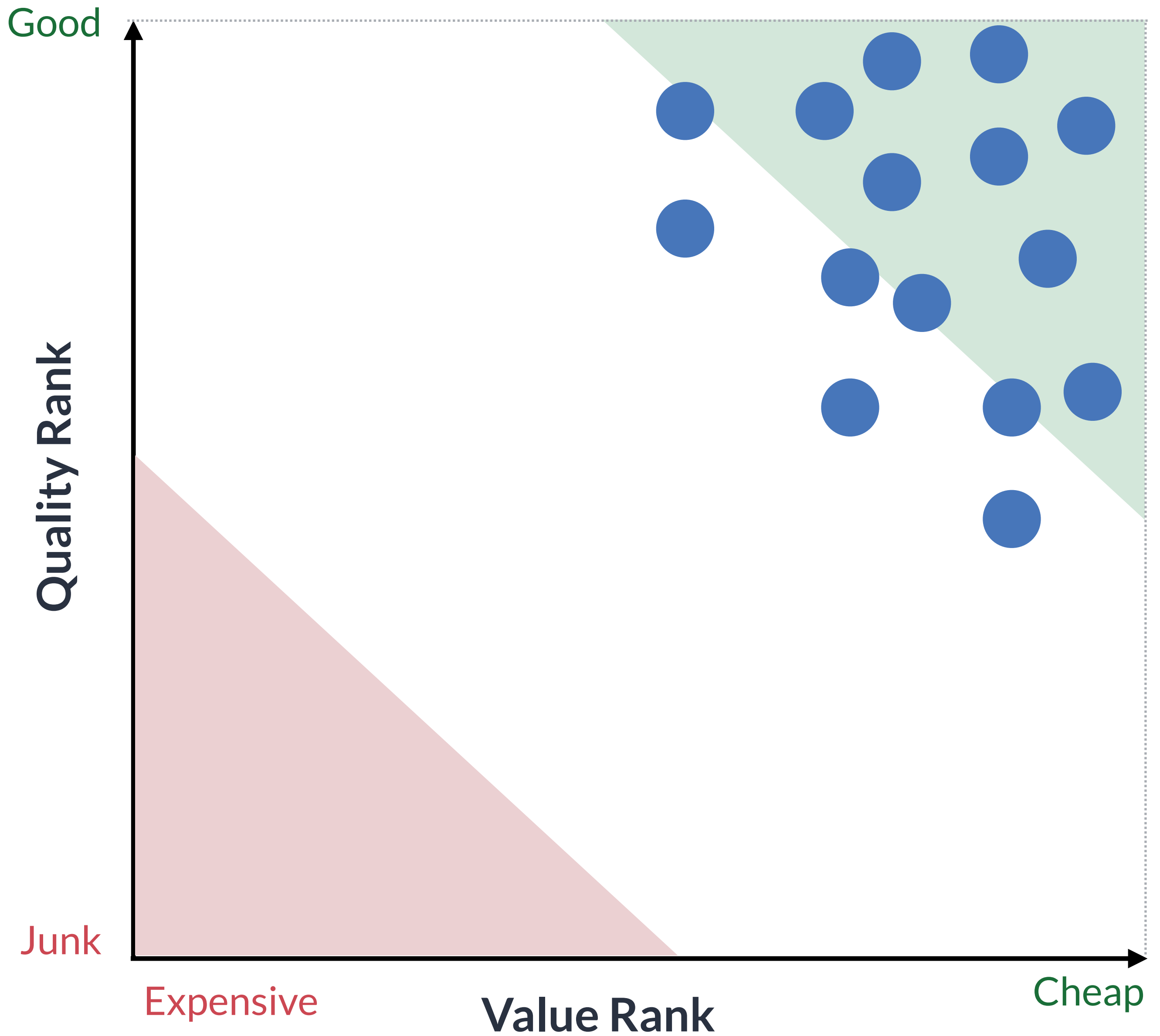
Financier and Author of “The Zulu Principle”

# Picking good, cheap stocks

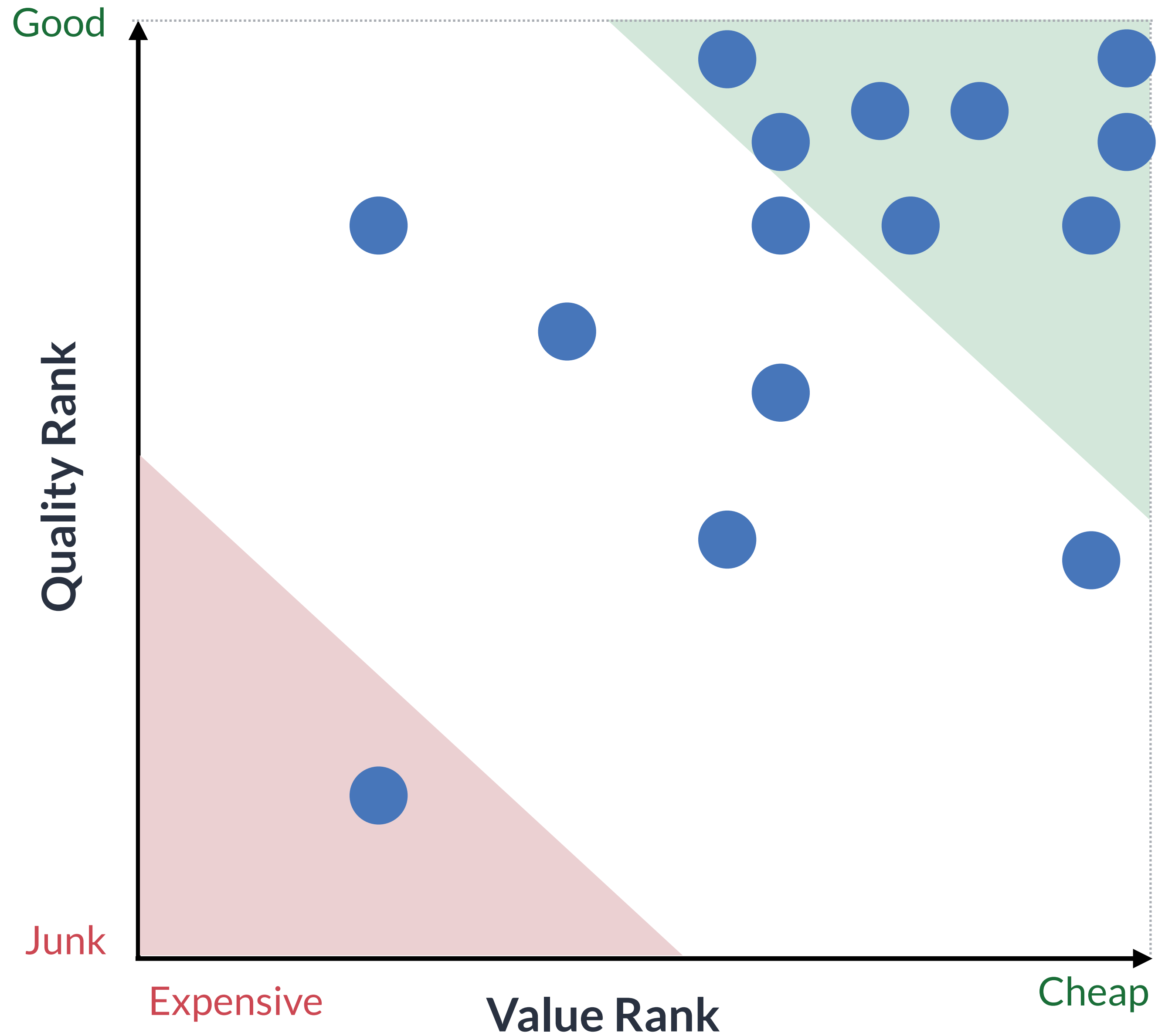




# Picking good, cheap stocks



Over time, each stock's quality, value and momentum drifts





# When to sell? Other common approaches

*Some examples of fundamental and technical triggers*

- ✓ **Stop Loss:** Sell when the share drops [15%] below your buy price.
- ✓ **Fundamental:** Sell when the [P/E ratio] reaches the [average] for the market.
- ✓ **Technical:** Sell when the price falls below the [200 day] moving average.
- ✓ **Qualitative:** Sell when the investment thesis no longer holds.



# The Alerts

Learn how to use the alert tools on Youtube



<https://youtu.be/PaABeGMfOug>

# Where this all leads

Real impact and results for thousands of private investors

# Before - unstructured process



**James**

Subscriber

“

**I used to take a very unstructured approach** when picking investments. I would use tips from financial publications to give me pointers and simplified financials to screen.



**John**

Subscriber

“

**My previous approach was haphazard.** I used a mix of sources - magazines, internet etc - that were often contradictory and combined this with very limited research.

# After - discipline, confidence & results



**James**

Subscriber

“

I now make **decisions that are far more grounded in data**. My **results have improved significantly**. I feel more **confident in my decisions** and results beat market indexes.



**John**

Subscriber

“

I **screen potential purchases** using the StockRanks, Styles and RiskRatings. The **overall result has been market out-performance**. This is pretty impressive given how hard it is to beat a total return index.



# In their own words

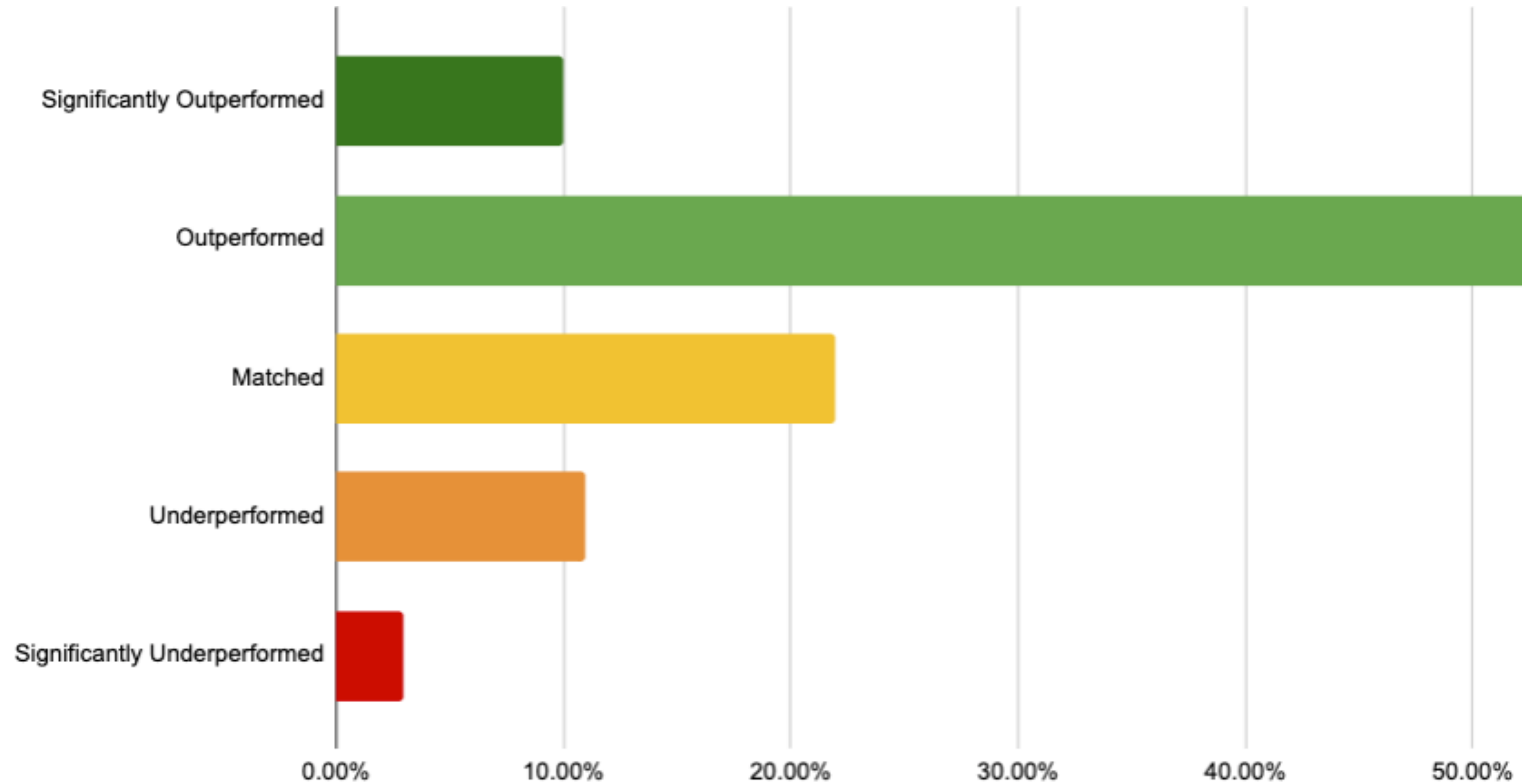
How Stockopedia has helped Nick King's investment process



<https://youtu.be/skxHUFu4nY>

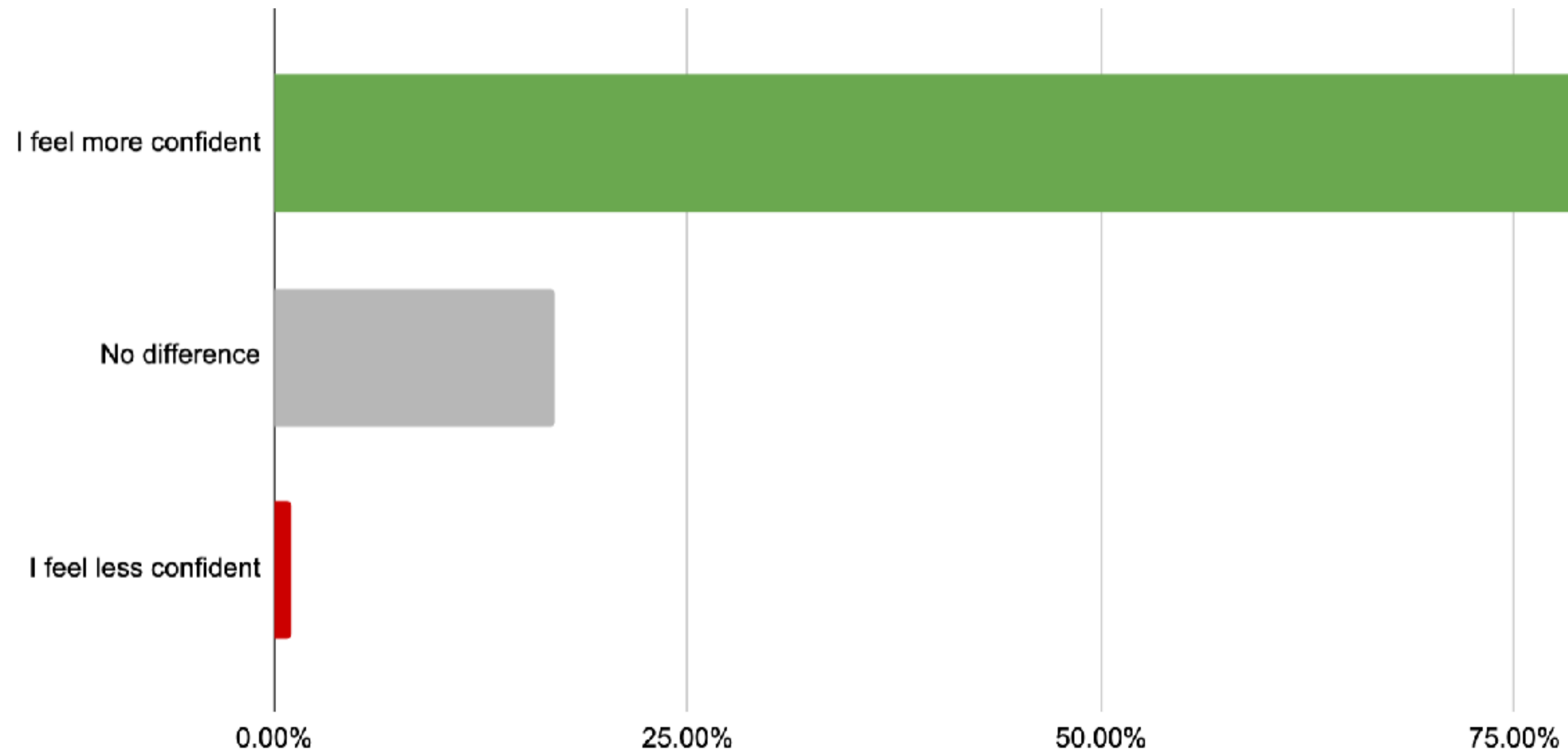
# Subscriber Surveys

Since subscribing to Stockopedia has your performance outperformed or underperformed the market?



# Subscriber Surveys

Do you feel more or less **confident** in your understanding of the market since using Stockopedia?



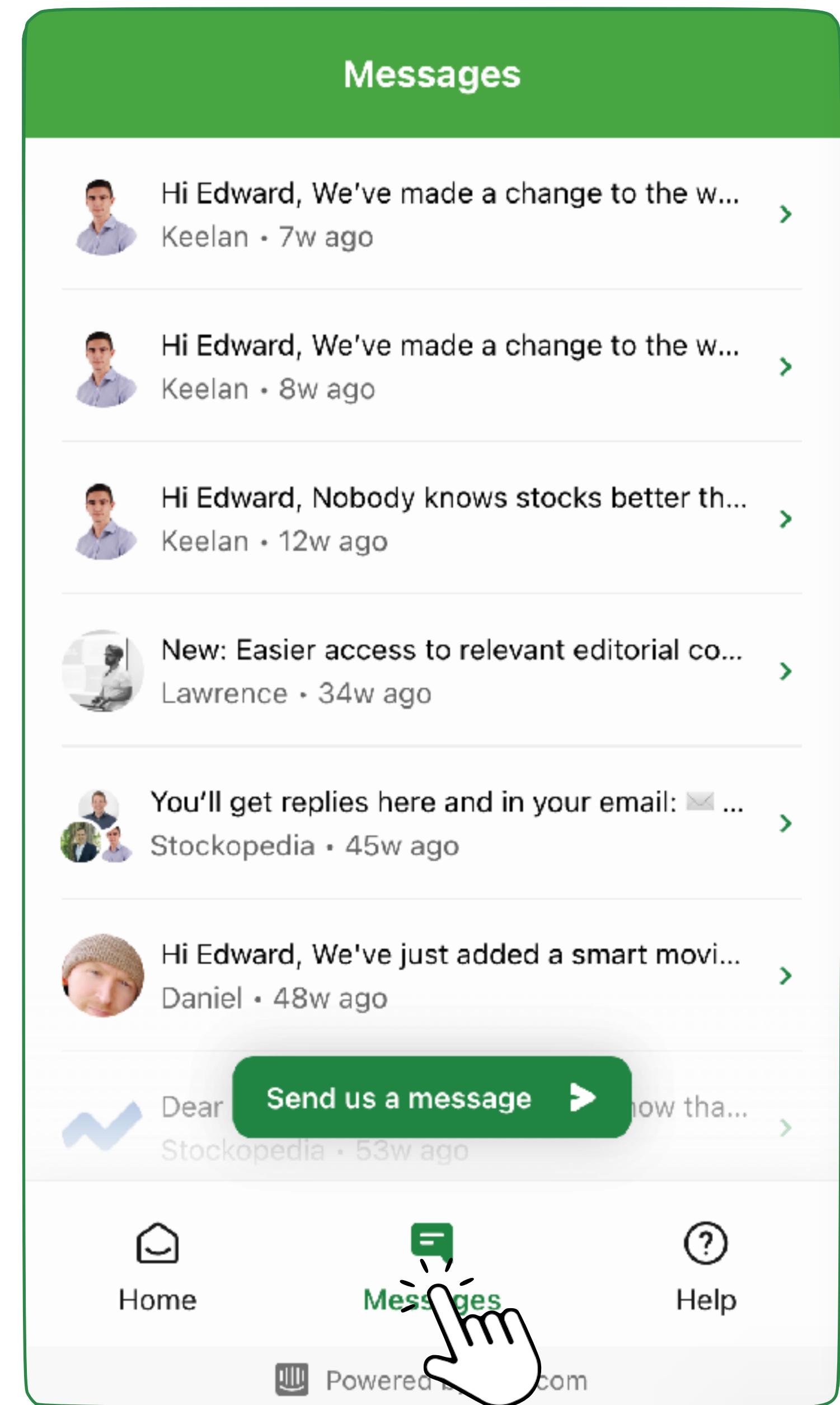


# Common Questions

Answers to queries we are often asked

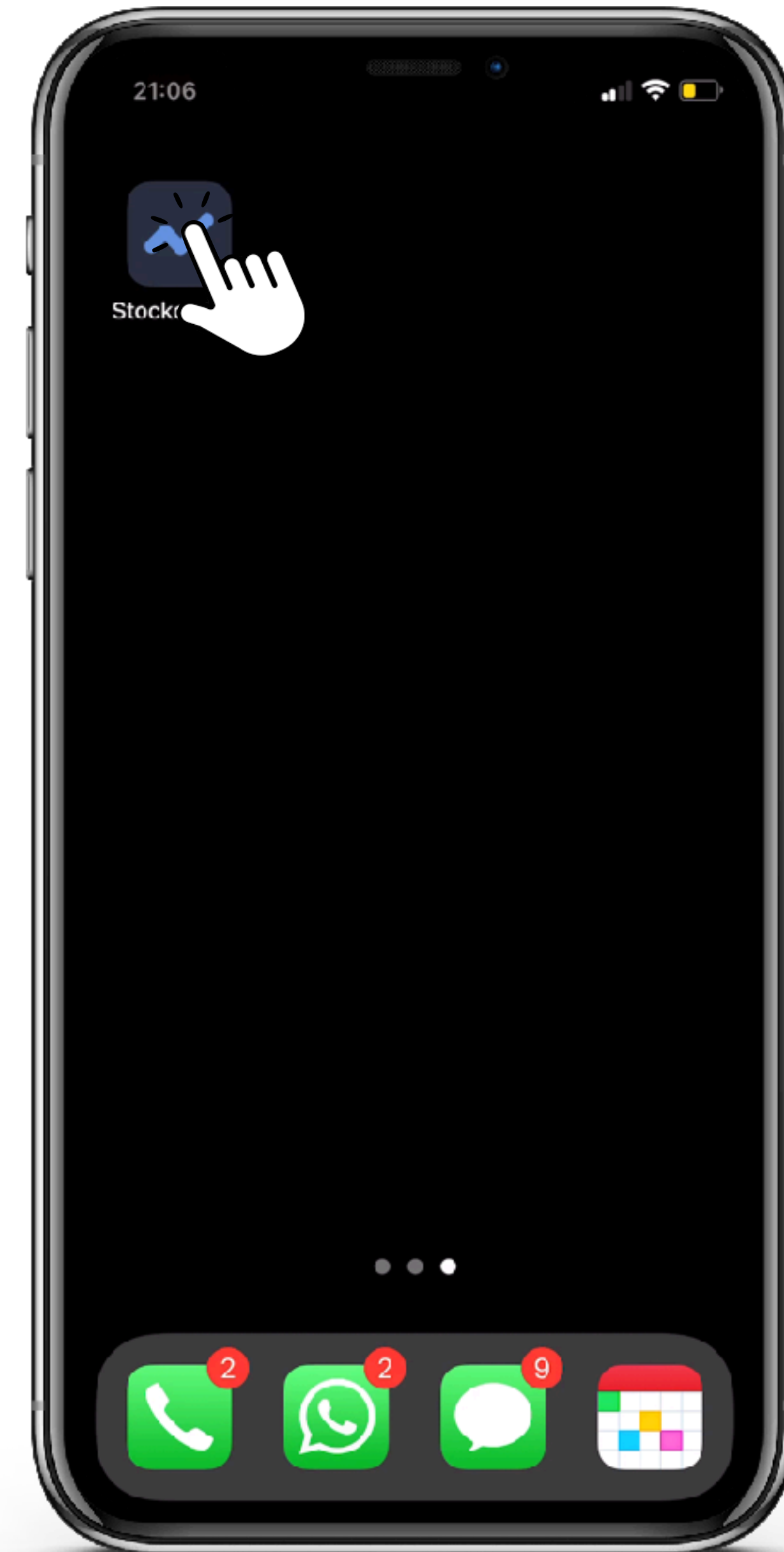
# How do I get help?

We provide 1-1 support, and help articles through the green button at the **bottom-right** of the website



# Do we have an app?

We provide a responsive web app that can be added to your Tablet or Phone Homescreen



# Where does the data come from?

1. Our data sources, employ **hundreds of analysts** who scan, audit & standardise financial data into their databases & upload to their financial clouds.



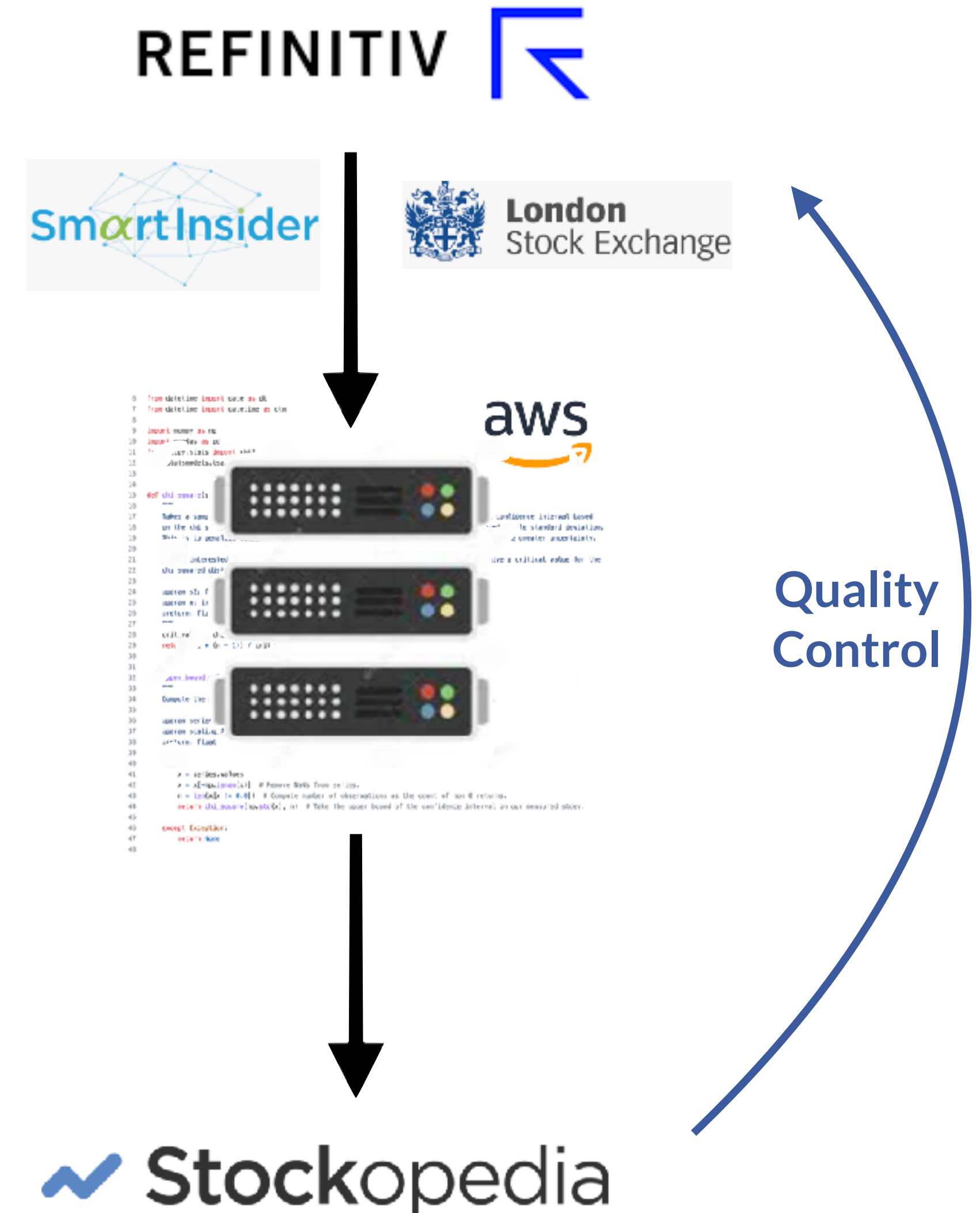
2. Each day we download **financial statements, forecasts, price histories, major shareholders, director deals, news and profile info** to our databases.



3. Our analysts & developers structure & clean the data, before **computing 60 million computations daily** to generate a **library 2000+ essential, accurate statistics** on every stock. From simple PE Ratios to Piotroski F-Scores.



4. We then rank and screen the market and perform quality control before publishing the data on our **StockReports** and in our **Screening Database**.



# What stocks are covered?

We provide StockRanks for 32,000 stocks around the world



- UK - LSE, AIM and Aquis Exchanges
- Pan European coverage excl some minor exchanges
- USA - Nasdaq, NYSE plus OTC and Pink Sheets
- Canada - Toronto & Vancouver
- Australia & New Zealand Exchanges
- India, Japan, South Korea, Taiwan, Singapore & Hong Kong



# Everything you need to improve your investing



[www.stockopedia.com](http://www.stockopedia.com)