

Mastering Stockopedia

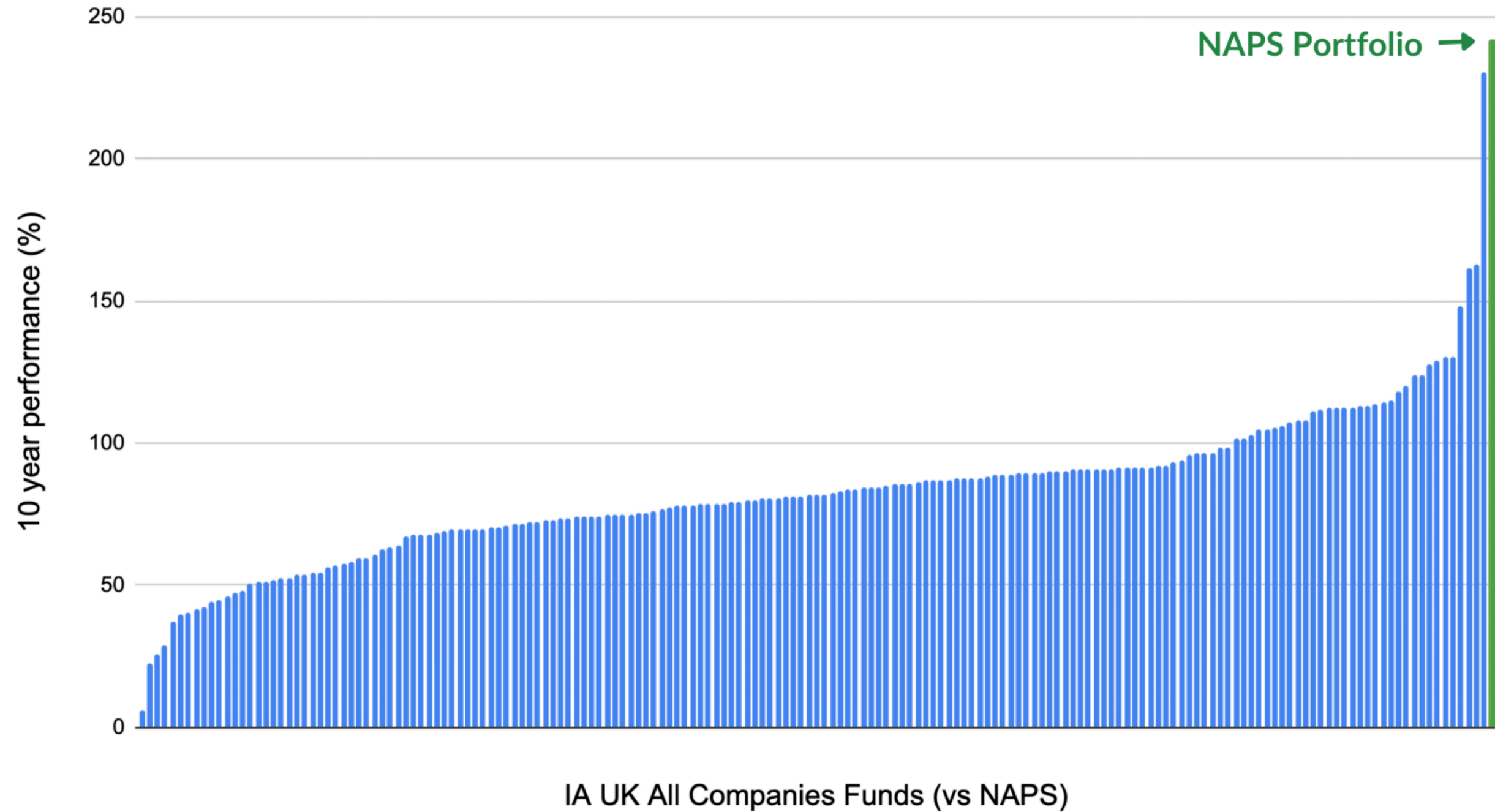
Learn to use the platform to radically improve your investment process

It's about your results

Ten Years of our Model Portfolio Results (NAPS)

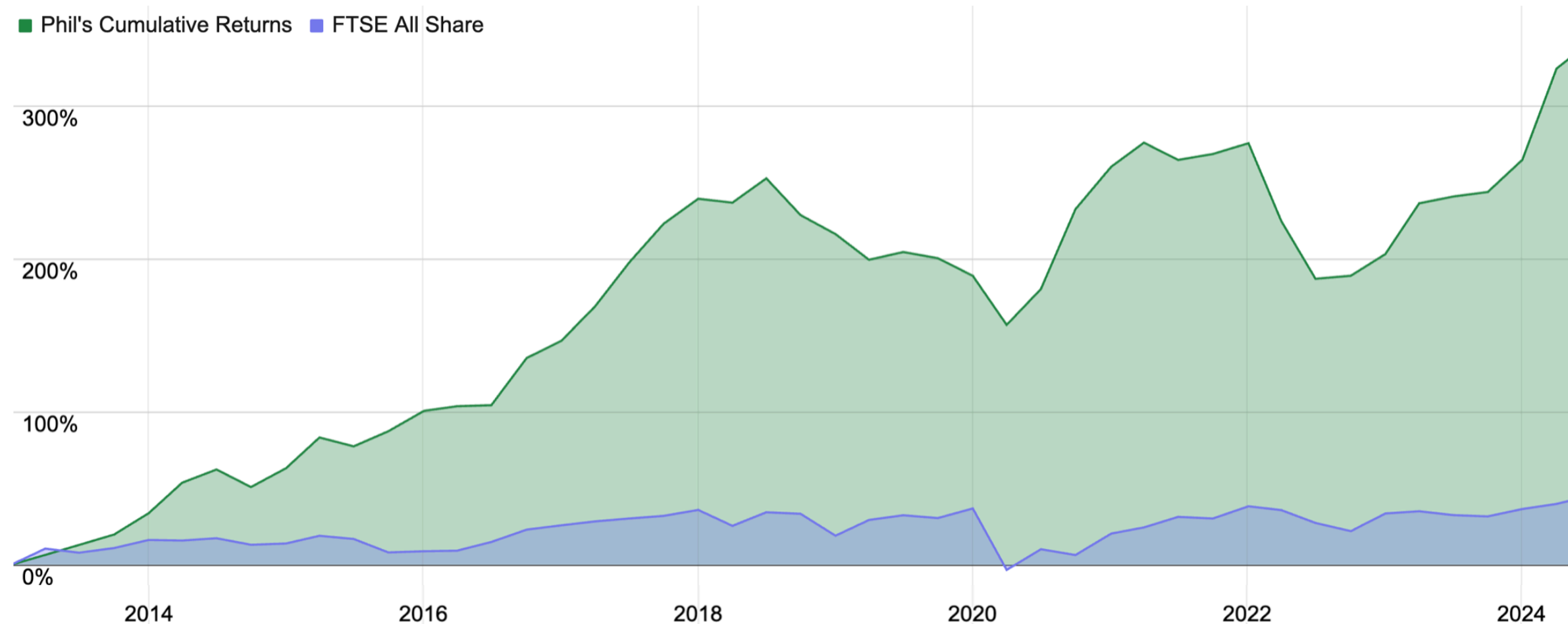


Ten Years of our Model Portfolio Results (NAPS)



Case Study: Phil Hoffer's results

“ Since changing my approach... I've achieved total returns of 400% in 11 years in spite of the market turbulence of the last few years.”





“I’m not someone who can dissect a balance sheet.... the StockRanks help me separate the wheat from the chaff.

Stockopedia and the strategy I have developed have helped me generate genuinely life changing returns”

Private investors looking for a different **process and environment** to help them **find winning stocks** without relying on share tips or guesswork.

The mistakes we all make...

Or how not to pick shares!



Ed Page Croft

*Founder & CEO, Stockopedia.com
ex Goldman Sachs Private Clients*

One of my early journal records...

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 rumors.	
Don't buy small companies with <u>no</u> earnings.	
Don't average down.	
Use a stop loss. @ 10 or 15% <u>max</u> .	

One of my early journal records...

Sardinian Gold Miner

Bought on a tip

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 rumors.
Don't buy small companies with no earnings.
Don't average down.
Use a stop loss. @ 10 or 15% max.

90% Loss !

Don't buy tips!

Don't average down!



Picking “Story Stocks”

We often fall for compelling narratives and follow the crowd into over-hyped themes, without rigorous analysis.

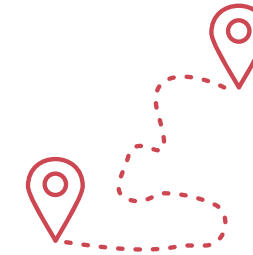
 *73% of story stocks underperform*



Unreliable Sources

Social media full of ramping, sponsored research with hidden agendas, news driven by PR. Ad-driven websites, poor data!

 *Confusing and conflicting research*



No Clear Strategy

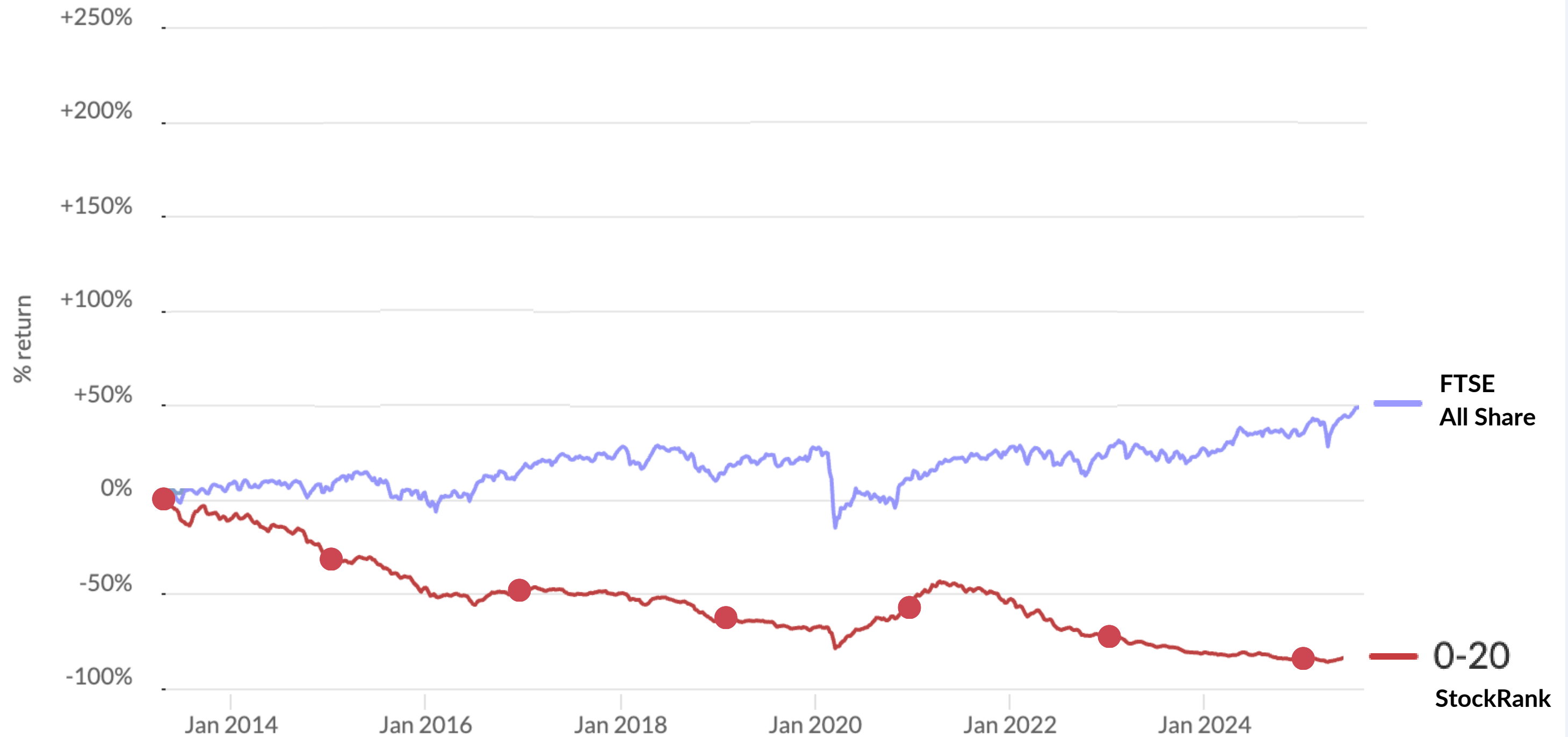
No proven framework for what to buy or sell - woolly, unstructured guesswork creating anxiety. Trial and error with easily lost, capital.

 *£1000s lost learning what works*

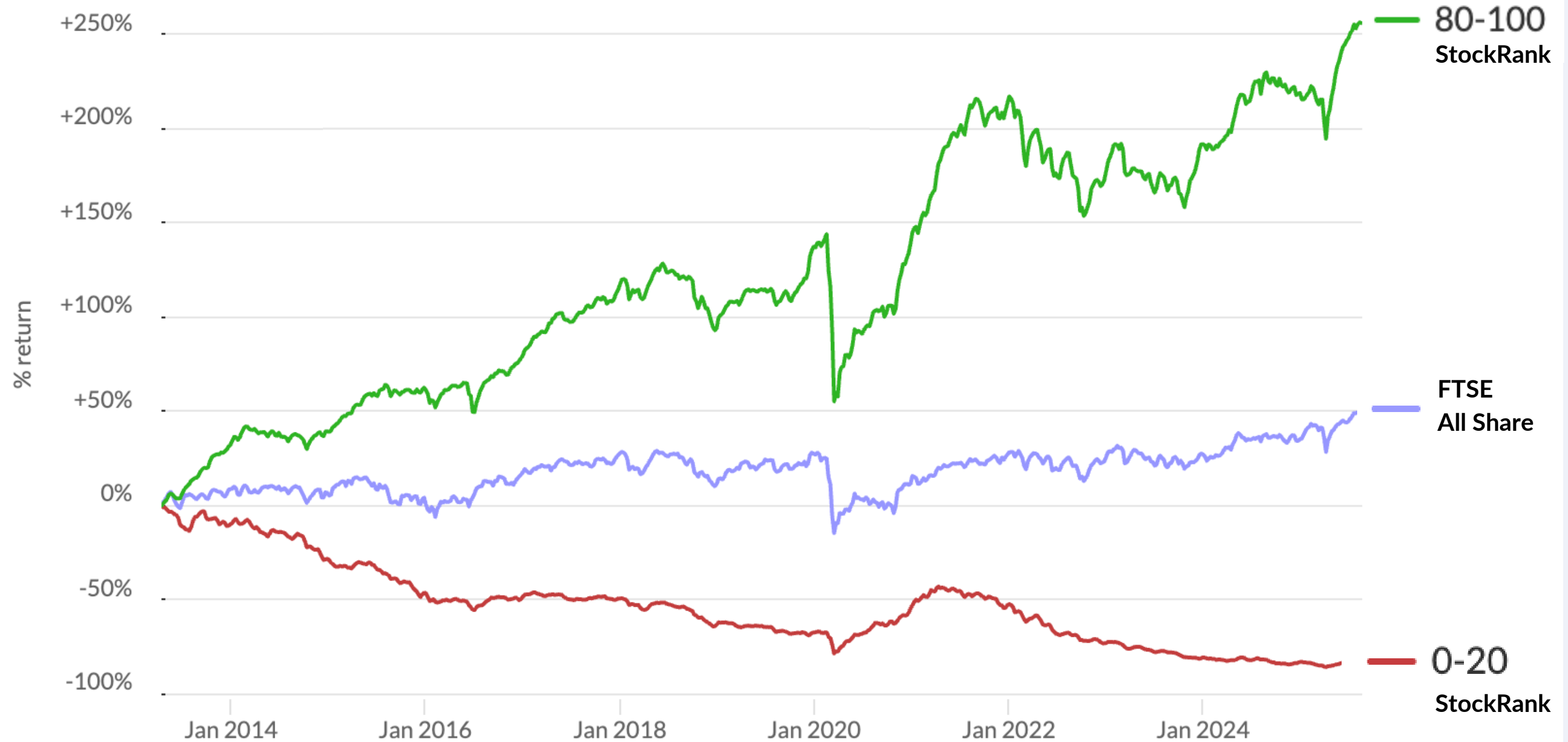
Story stocks have predictable outcomes



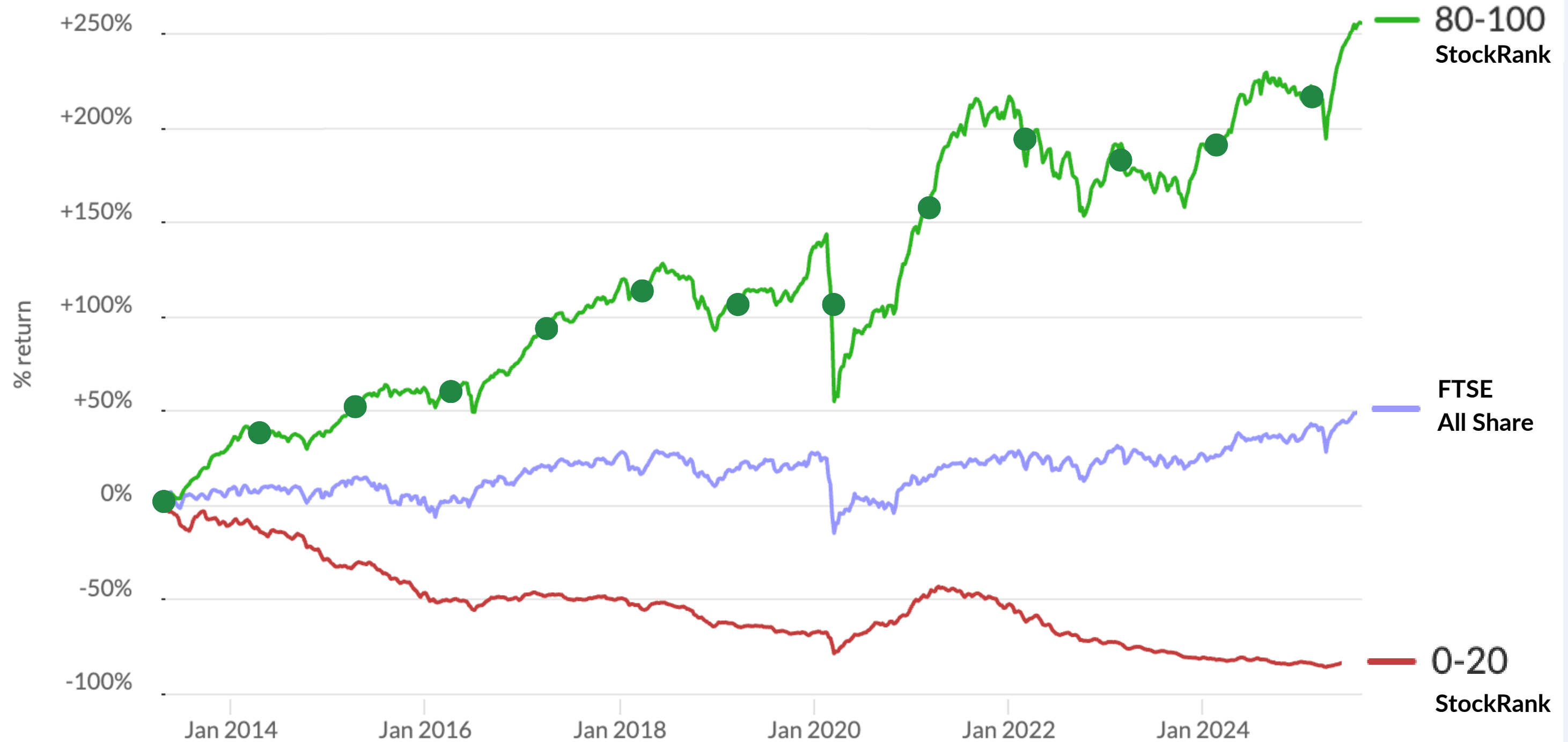
Story stocks have very negative average outcomes



You can “behave your way” to a better outcome



You can “behave your way” to a better outcome

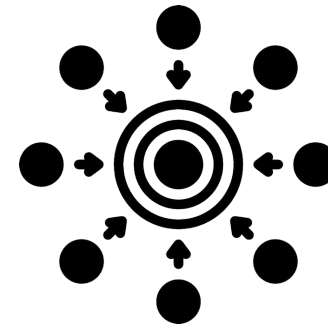




Pick High-Odds Winners

Quickly find the stocks most likely to deliver strong returns with the **StockRanks™**, which score every company from 0–100 using the proven return drivers of **Quality**, **Value**, and **Momentum**.

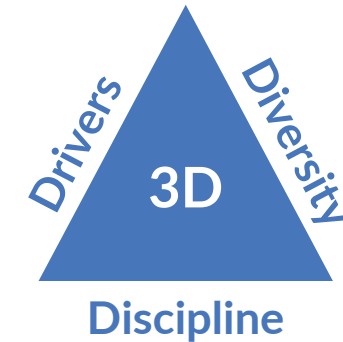
✓ *Helps avoid Story Stocks*



Accelerate Your Research

An **all-in-one platform** that delivers powerful data-driven insights, tools, news and research - presented clearly for easier decision-making. No adverts. No sponsorship. Fully aligned.

✓ *Helps avoid Unreliable Sources*



Master Proven Methods

Level up your investing strategy with extensive learning materials, our 3D Investing principles, and direct access to our market experts and a 10,000 strong community of private investors

✓ *Helps Clarify Strategy*

The following pages within this document have been produced by Stockopedia Ltd ("Stockopedia") for educational & informational purposes only. All rights regarding these pages are reserved. It is not for general circulation.

Stockopedia is a subscription-based data & screening web service for self directed individuals who have an adviser and/or are comfortable making their own decisions. Use of our data is subject to express Terms of Service. This service is intended to be used and must be used for informational purposes only. Our Stock Reports and screens are based on underlying data from other suppliers including LSEG which is believed but not guaranteed to be accurate. Any figures cited are subject to change or possible correction. If we are notified of a possible error, we will endeavour to notify our supplier of this issue, although we cannot be certain that they will be willing to correct the error identified. Any forward looking information is based on the Consensus Analyst Estimate as defined by LSEG and is subject to their assumptions but does not involve subjective judgement by Stockopedia.

We are not regulated by the Financial Conduct Authority. Stockopedia is not a broker/dealer, and we are not in the business of the giving or receiving of financial, tax or legal advice. None of our content constitutes or should be understood as constituting a recommendation to enter in any securities transactions or to engage in any of the investment strategies discussed in our content. We do not provide personalised recommendations or views as to whether a stock or investment approach is suited to the financial needs of a specific individual.

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.

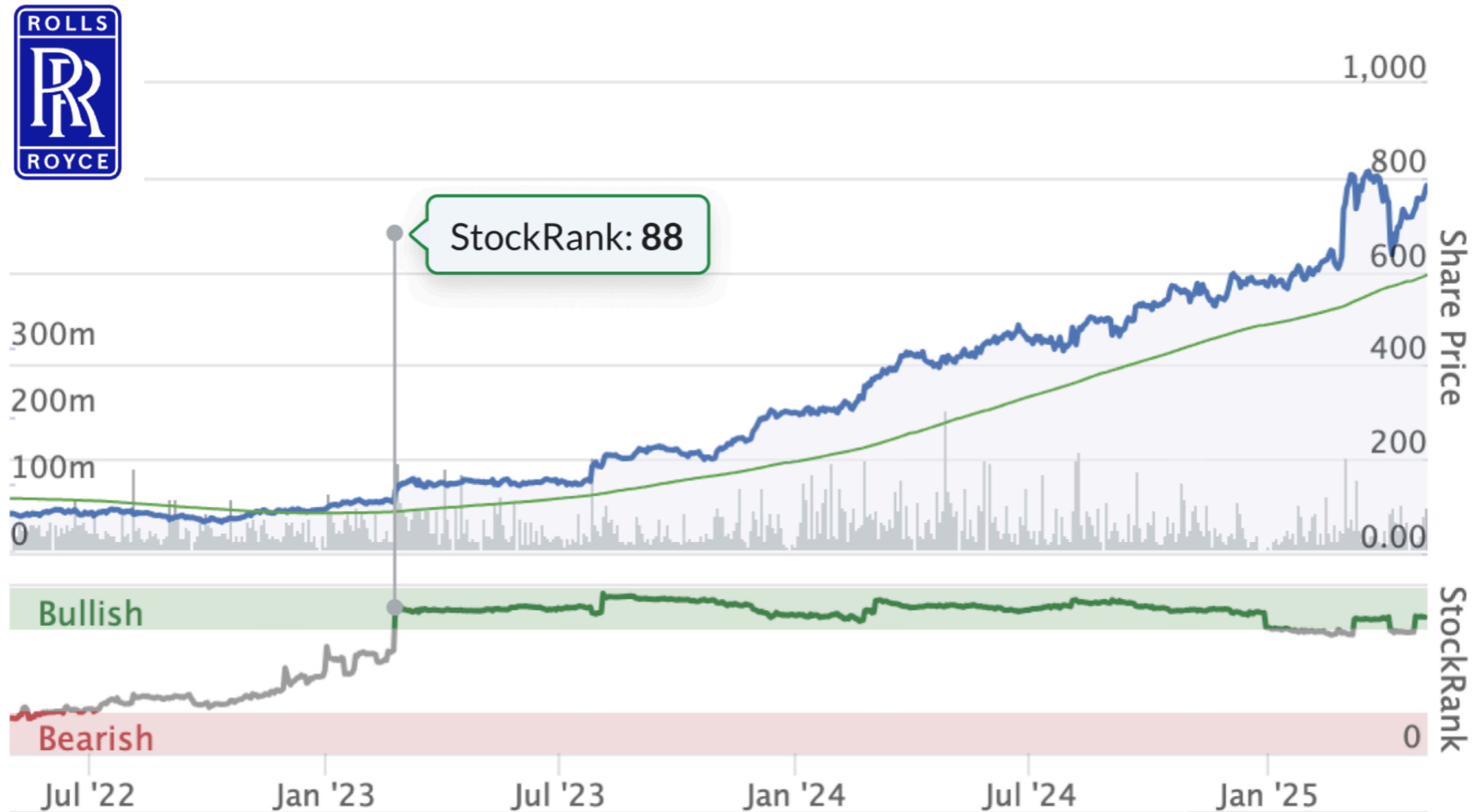
1. ~~Results: what we're all investing for~~
2. ~~Common problems: story stocks vs better behaviours~~
3. How to consistently pick winners (*QVM*)
4. How to accelerate your research process (*Platform overview*)
5. How to master proven methods (*Mentorship & Community*)
6. Where this leads: *Outcomes for the community*
7. Q&A

99

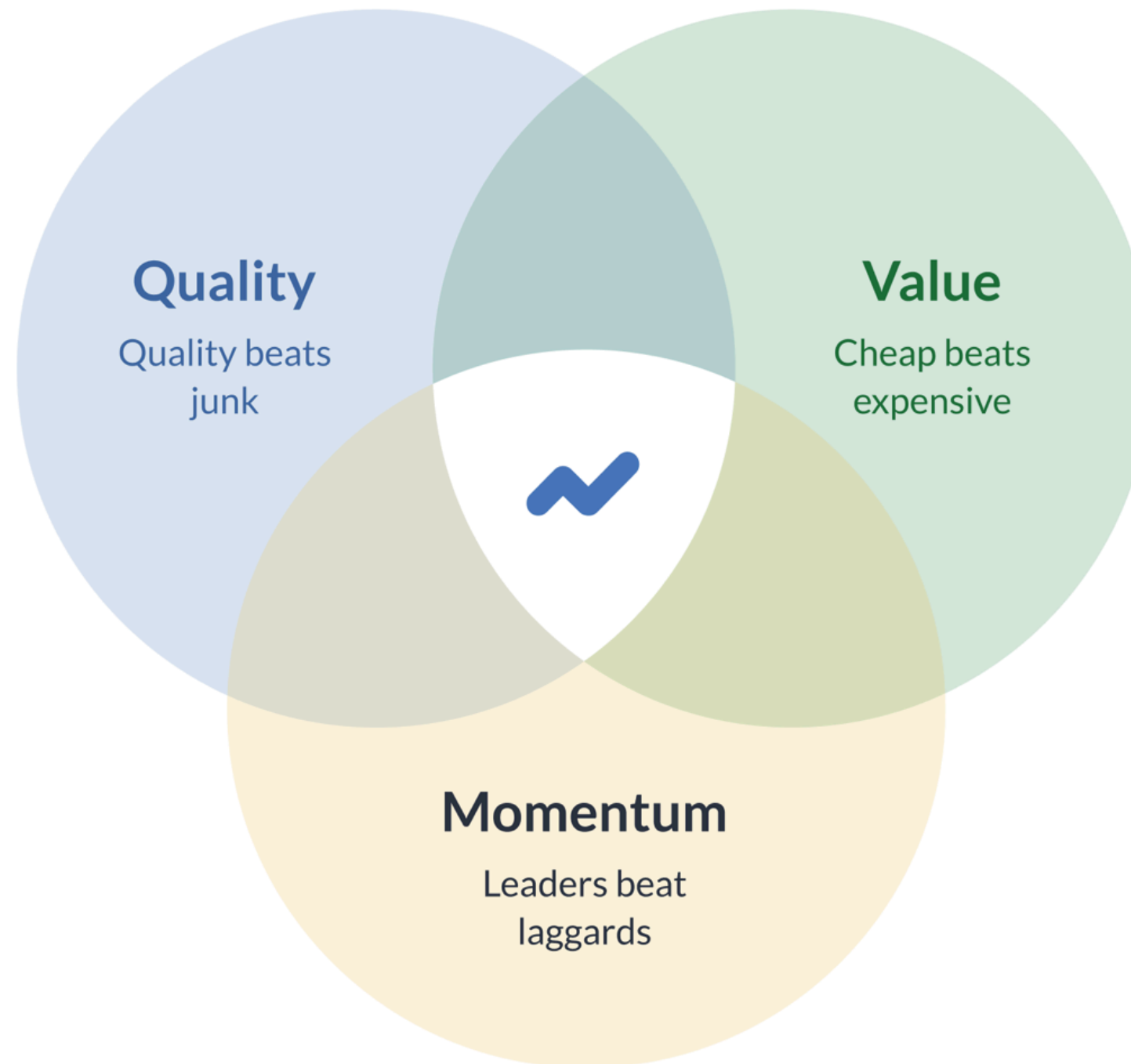
Consistently pick high-odds winners

Quality, Value and Momentum are the most powerful return “drivers”

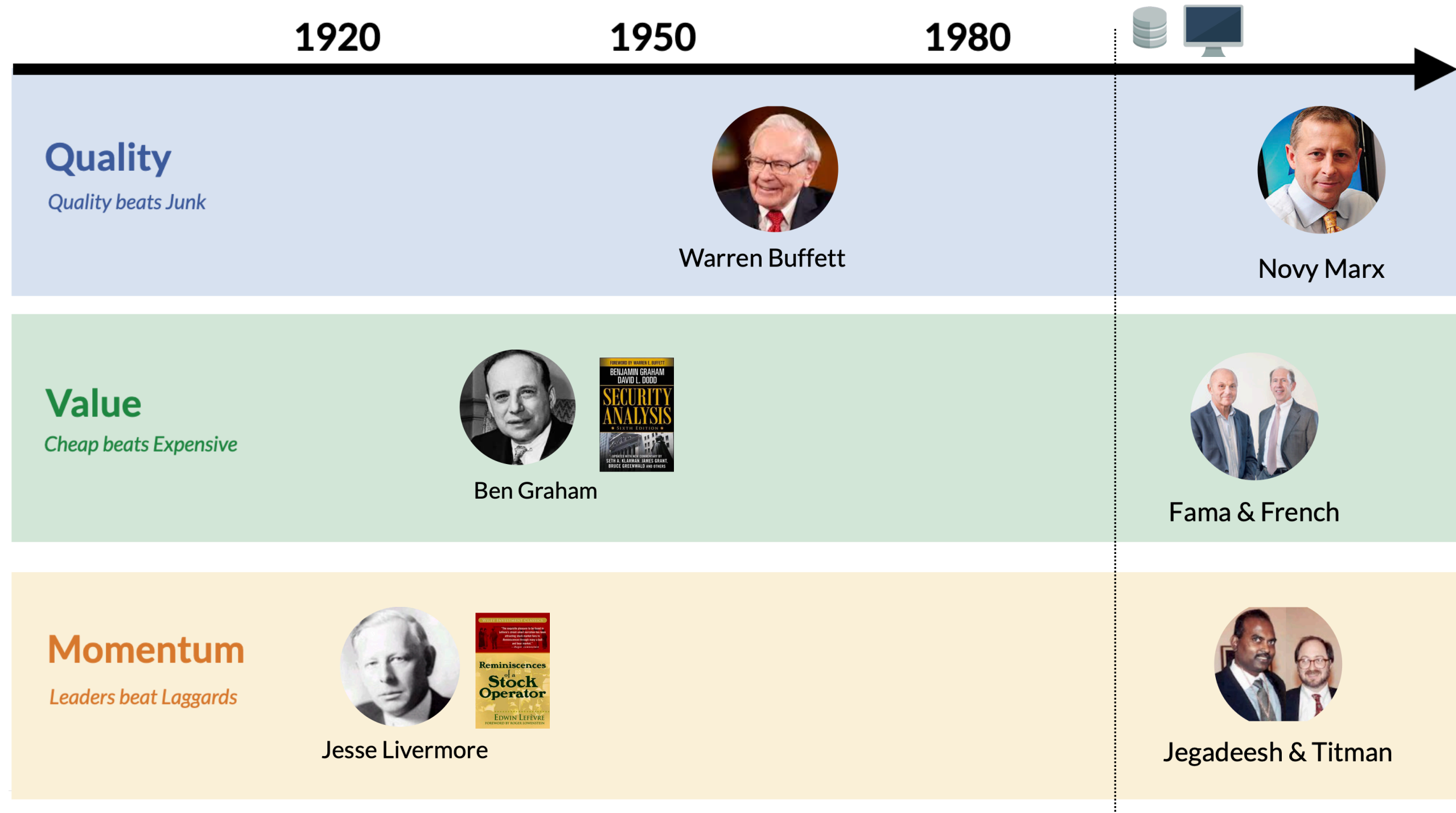
What was it about Rolls-Royce before it took off?

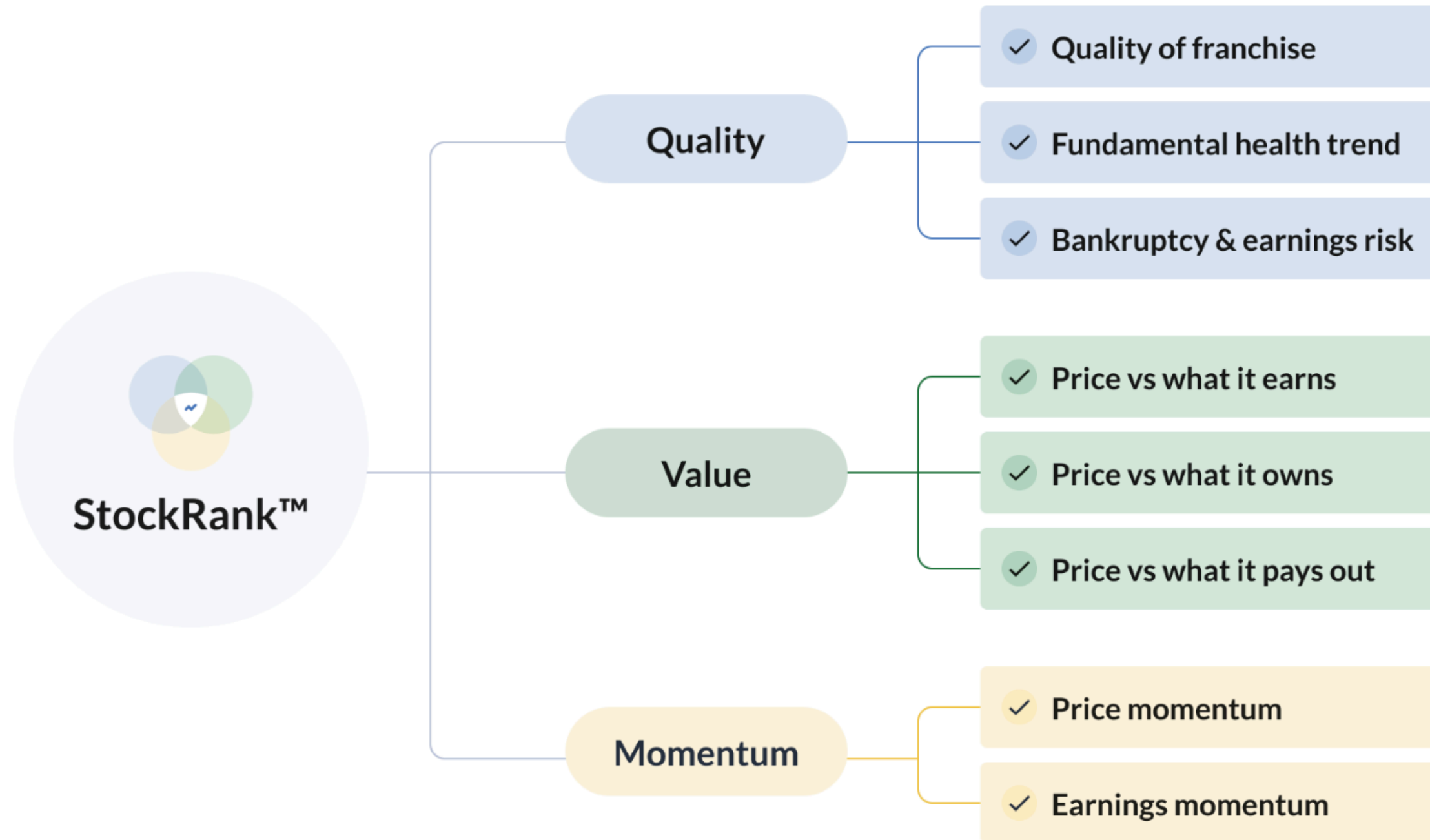


There are three primary drivers of stock market returns



These return drivers have been proven for decades







Market Cap£147

Enterprise Value£132

Revenue£75

Position in Market678th /

Quality98

Value83

Momentum98

StockRank™99

DISCUSSIONS

ADD TO FOLIO

PRINT

NOTES (2)

SET ALERT (0)

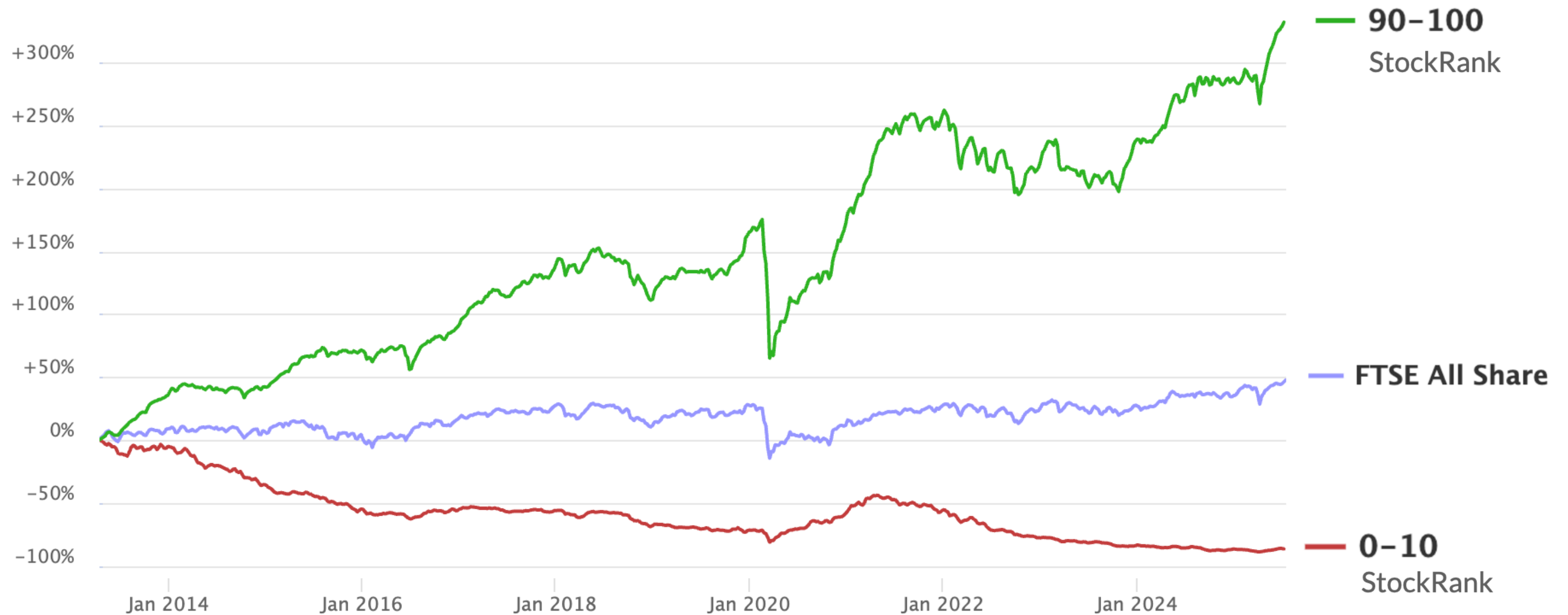
Momentum

Relative Strength (%)	
1m	+8.86% ●
3m	+0.812% ●
6m	+42.3% ●
1y	+171% ●
Volume Change (%)	
10d / 3m	-49.0% ●
Price vs... (%)	
52w High	-1.91% ●
50d MA	+18.3% ●
200d MA	+47.0% ●

Growth & Value

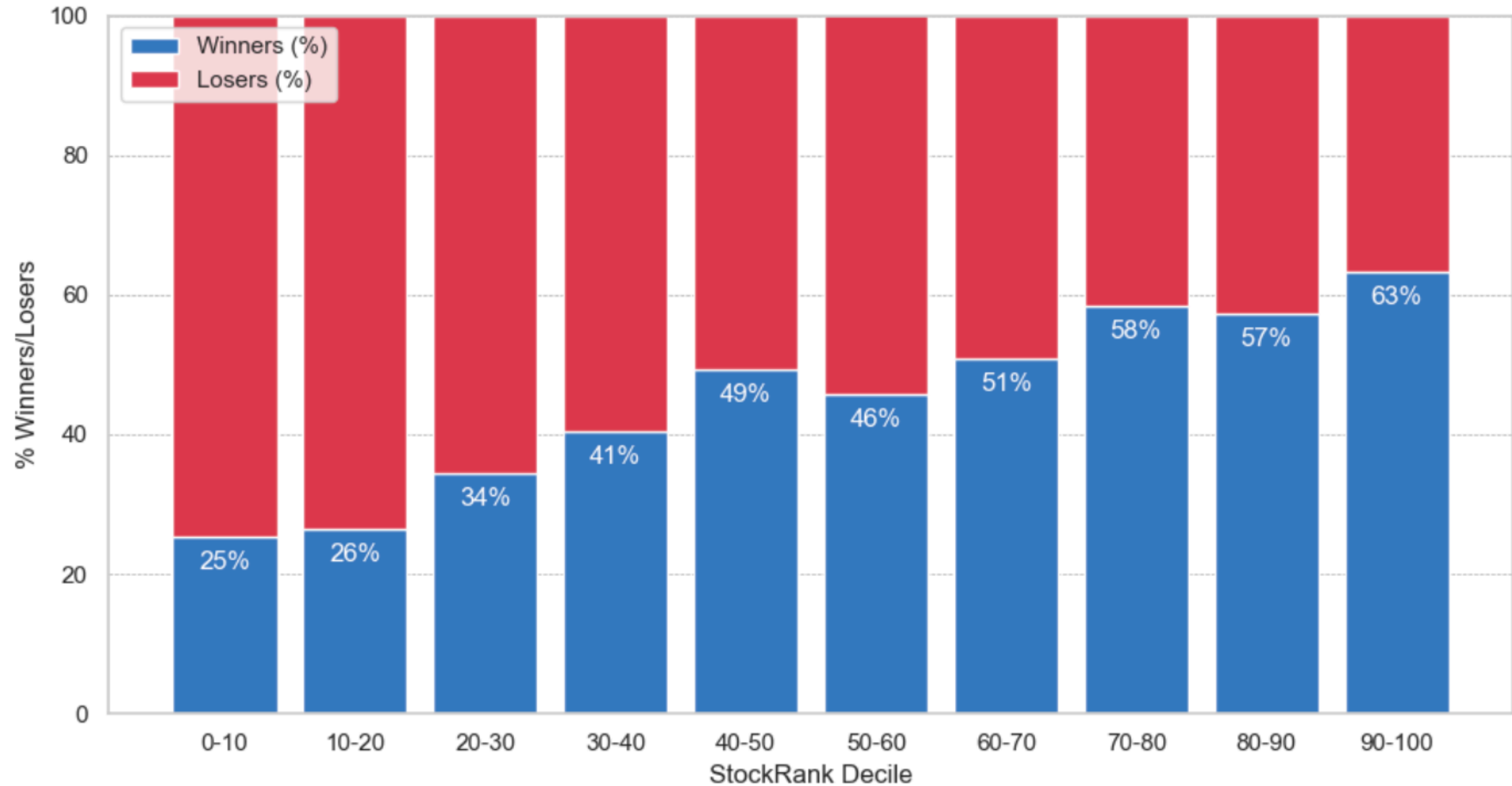
12m Forecast Rolling		Industry	Market
PE Ratio (f)	3.6		
PEG Ratio (f)	0.2		
EPS Growth (f)	29.4%		
Dividend Yield (f)	4.17%		
Valuation (ttm)		Industry	Market
Price to Book Value	1.65		
Price to Tang. Book	1.65		
Price to Free Cashflow	8.3		
Price to Sales	1.95		
EV to EBITDA	4.01		

The performance history of high and low “ranked” shares



* Based on equal weighted portfolios of UK stocks, > £10m market cap, segmented by StockRank, rebalanced quarterly

Likelihood of picking a “winner” or a “loser” by StockRank



Annualised returns of £10m+ LSE stocks, rebalanced bi-annually from 2013-2024.



AVCT – Avacta

Quality

9

Value

1

Momentum

4

StockRank™

1



MGNS - Morgan Sindall

Quality

97

Value

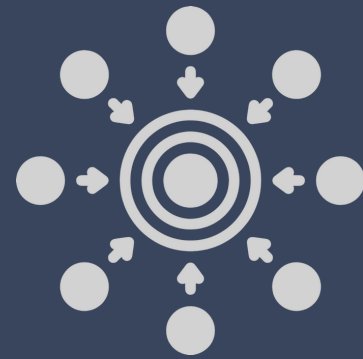
50

Momentum

97

StockRank™

97

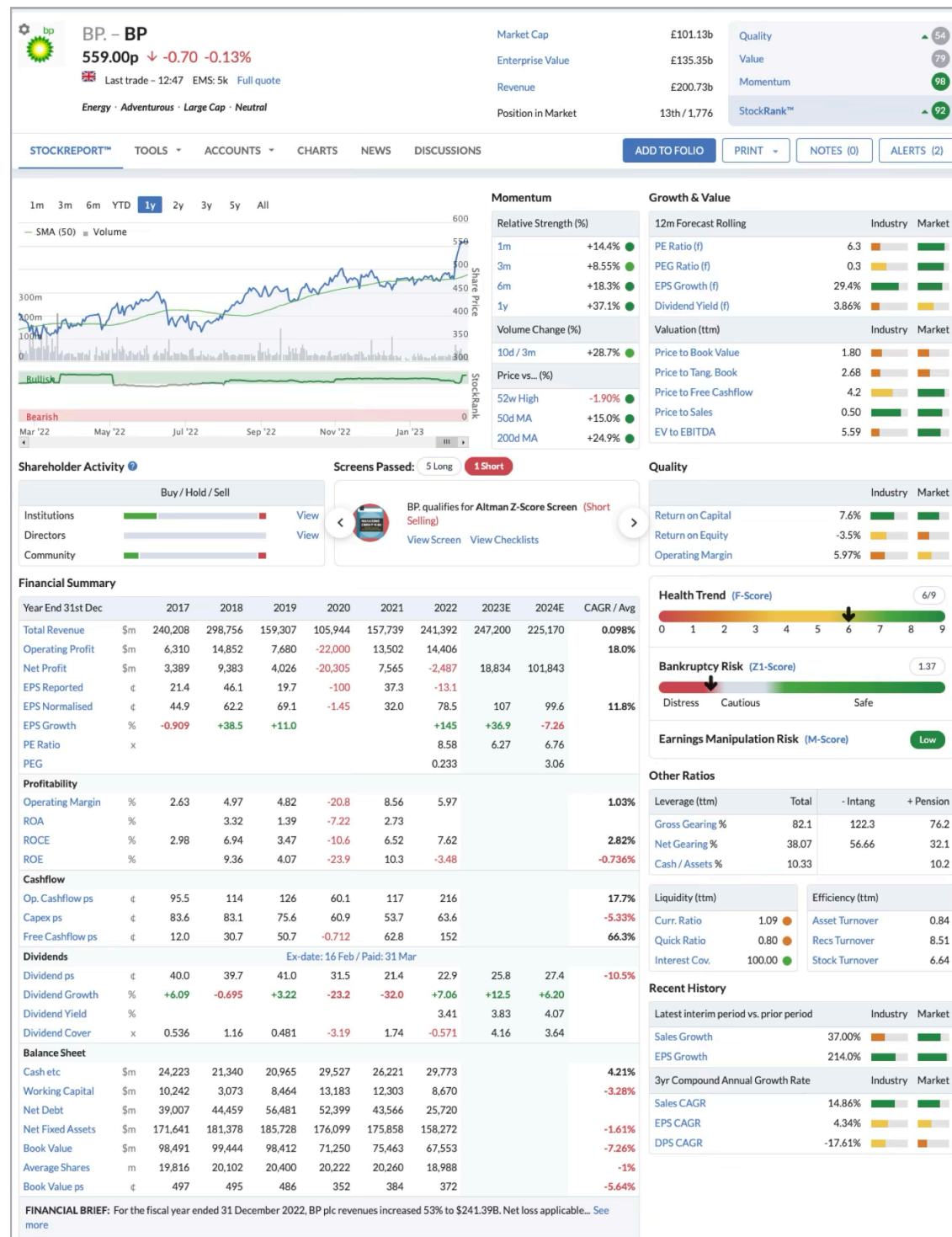


Accelerate your research

Using the Stockopedia “all in one” platform



“Sanity check” your shares - StockReports



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



David Stevenson,
Adventurous Investor



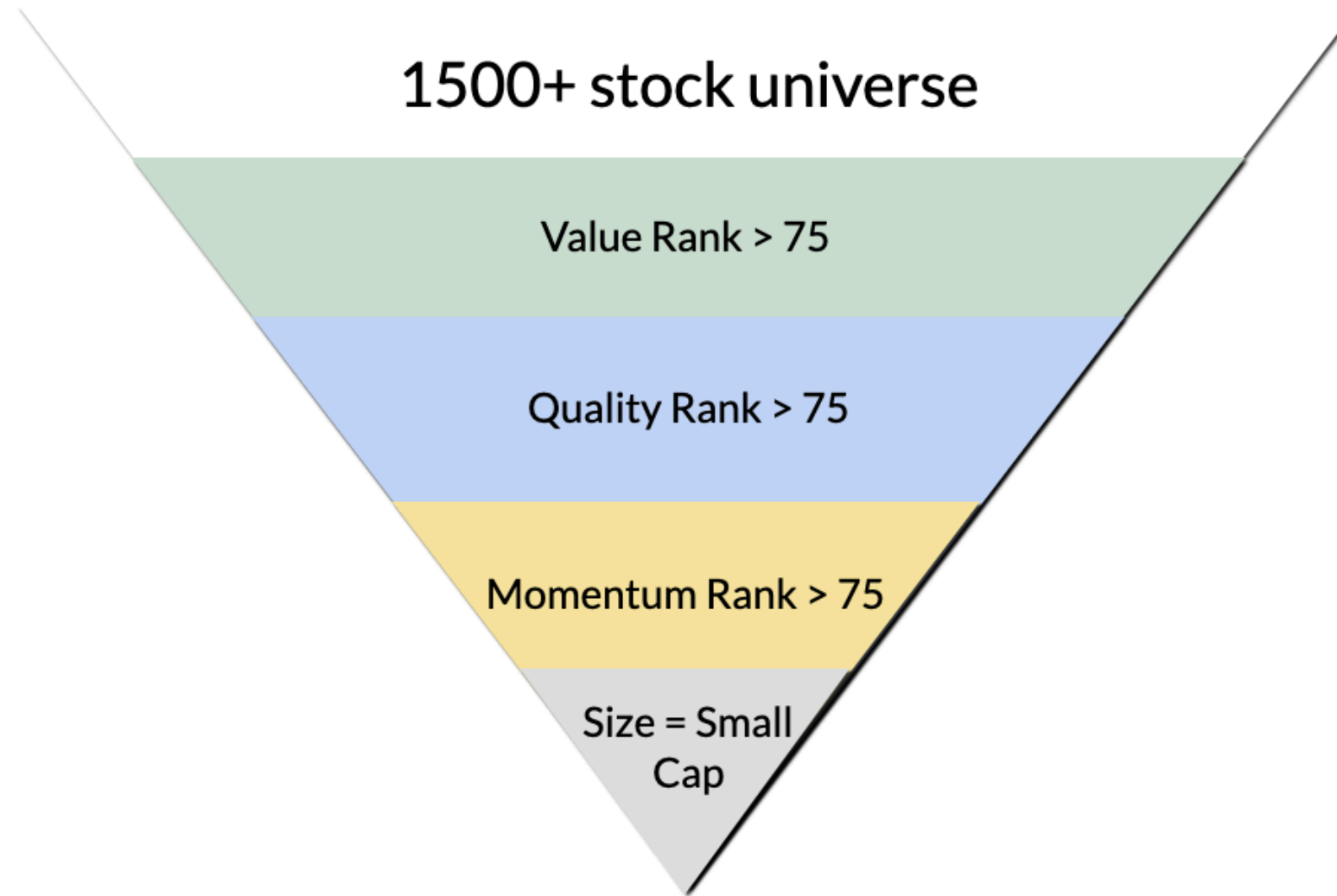
- Packed with comprehensive intelligence
- Fundamental & Technical Analysis
- Analysts forecasts
- Major Shareholder & Director Deals

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

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



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

Where does the data come from?

1. Our primary data sources (including LSEG), employ **thousands of analysts** who scan, audit & standardise financial data entry into their databases before uploading to their financial cloud.



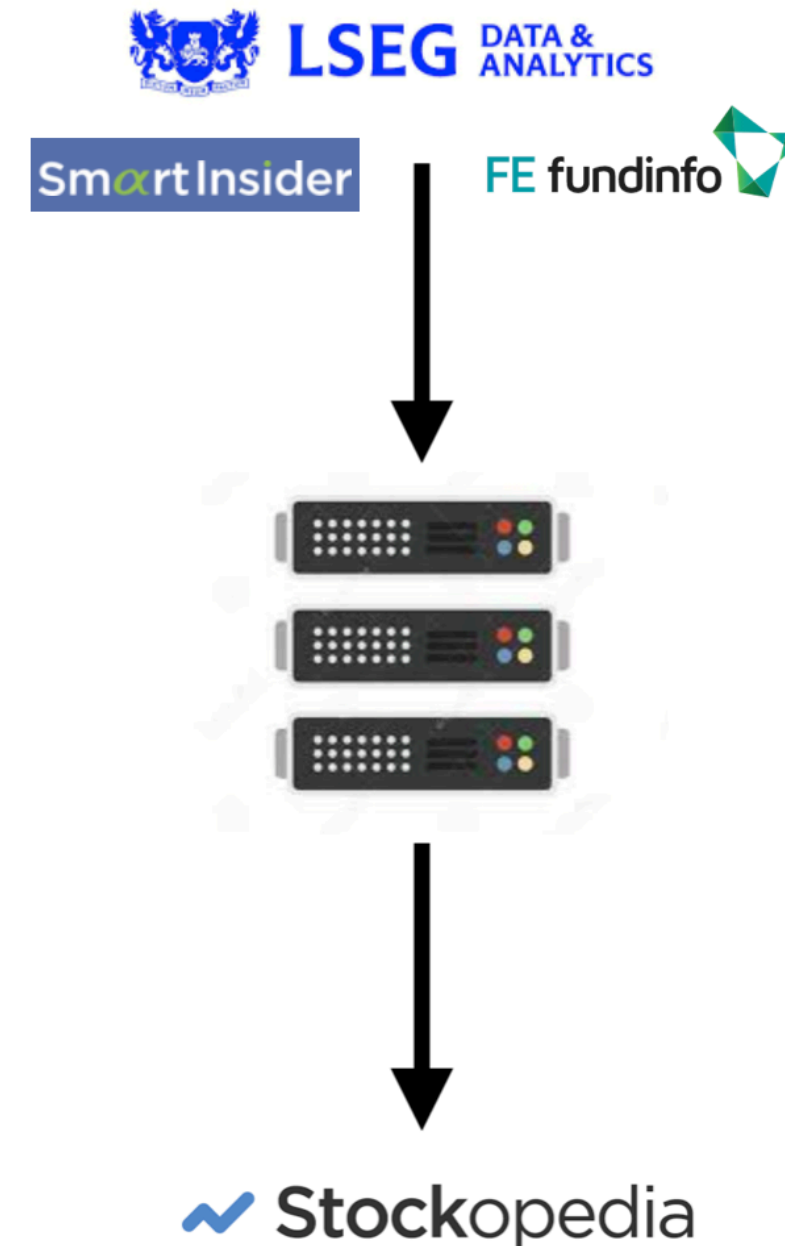
2. Throughout the day and night we download **financial statements, analyst estimate data, price quotes & histories and other company information** to our databases.



3. Our analyst & developer team organise it and clean it all up, and our servers **crunch over 60 million computations daily** to build up a **library of more than 2000 essential, accurate statistics** on every stock. From simple PE Ratios to Piotroski F-Scores.



4. We then rank and screen the market to filter the wheat from the chaff and publish the data on our **StockReports** and in our **Screening Database**.





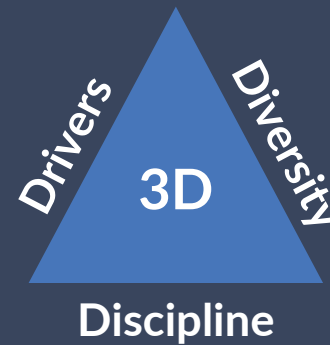
Identify your portfolio **risks** - Folios

1. Overconfident **position** sizing
2. Owning only **speculative** stocks
3. Lack of **sector** diversity





- **Fundamental:**
 - *Sell when the StockRank falls below 70*
 - *Sell when the [P/E ratio] reaches the [average] for the market.*
- **Technical:**
 - *Sell when the share drops [15%] below your buy price.*
 - *Sell when the price falls below the [200 day] moving average.*



Master Proven Methods

Develop strategy with mentorship and learning resources

Our editorial and analyst mentorship team



Ed Croft

*CEO & Founder
ex Wealth Manager*



Graham Neary

*Companies Editor
ex-Fund Manager*



Roland Head

*Stock Analysis
IMC, CFA*



Mark Simpson

*Stock Analysis
Author, Excellent Investing*



Alex Naamani

Data Research Insights



Keelan Cooper

Research Analyst

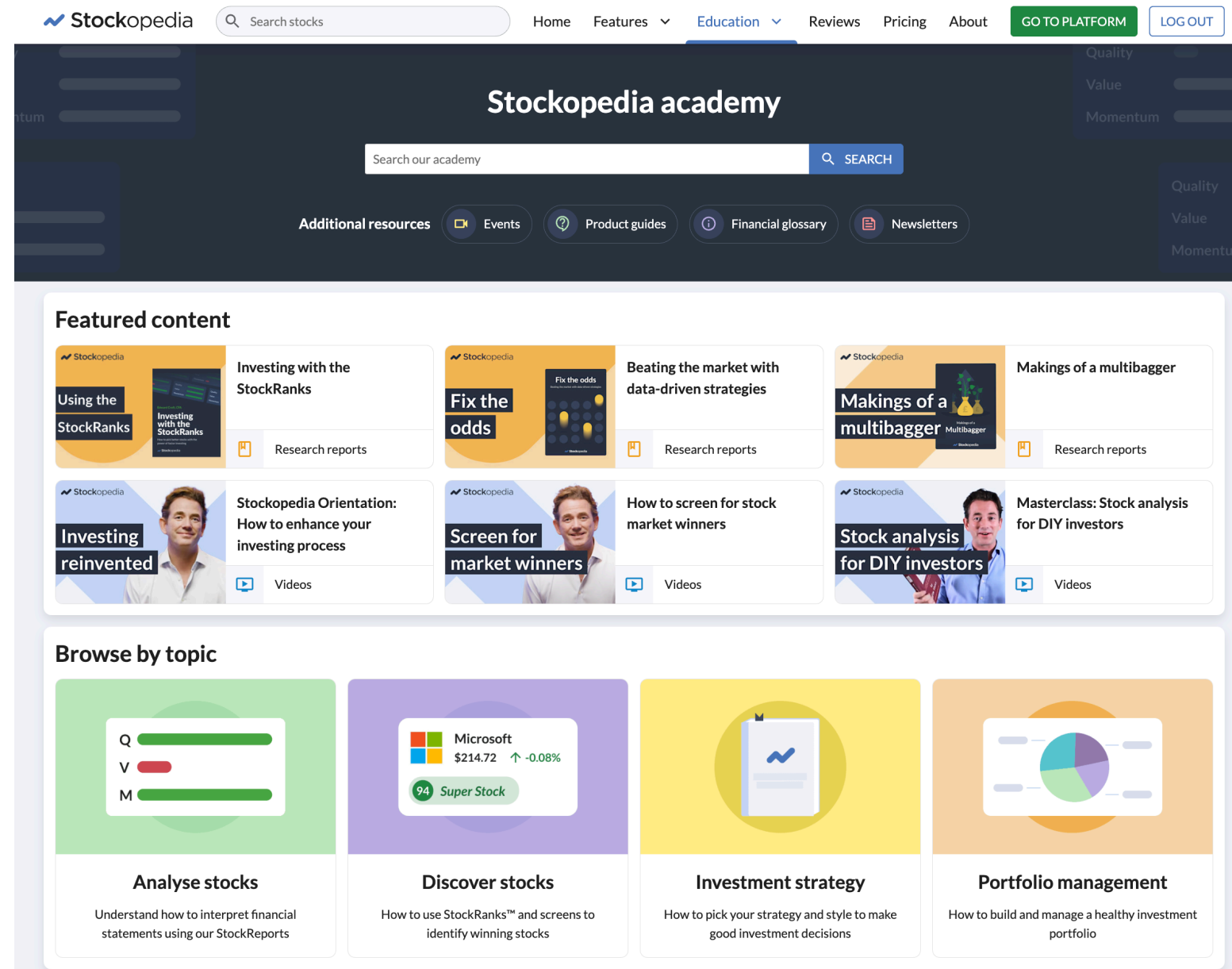


- **Daily Stock Market Report** - with a thriving community
- **Model Portfolios** - illustrations of our investment principles
- **Stock Pitches** - research reports on interesting shares
- **Screening insights** - ideas from our databases

Including dozens of comments daily from the community - please join in!

We provide a huge resource of learning materials, research studies, ebooks, webinars and videos...

... in the “Academy” and on our Youtube Channel.



www.stockopedia.com/academy

Where this all leads

Real impact and results for thousands of private investors



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.



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.



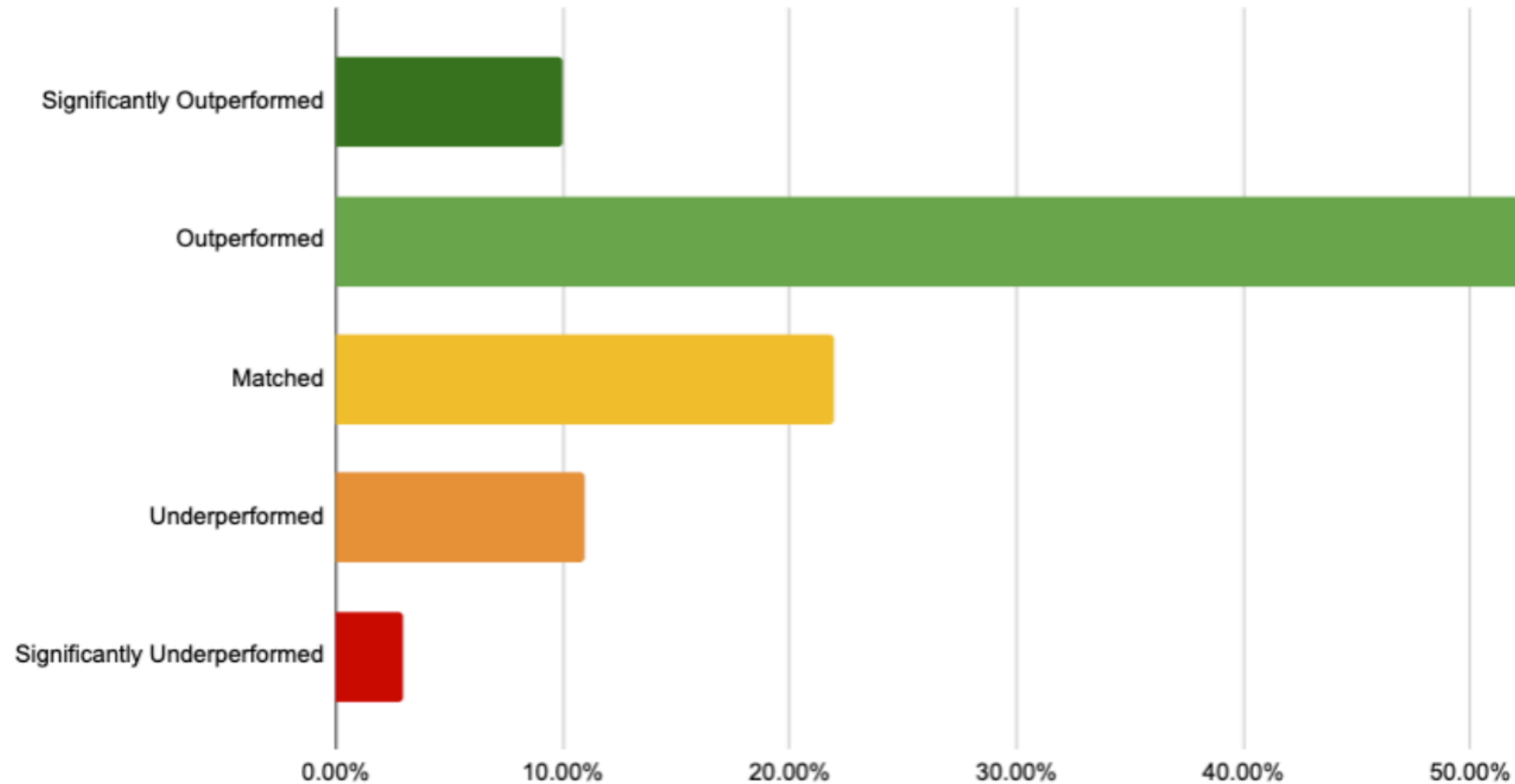
John

Subscriber

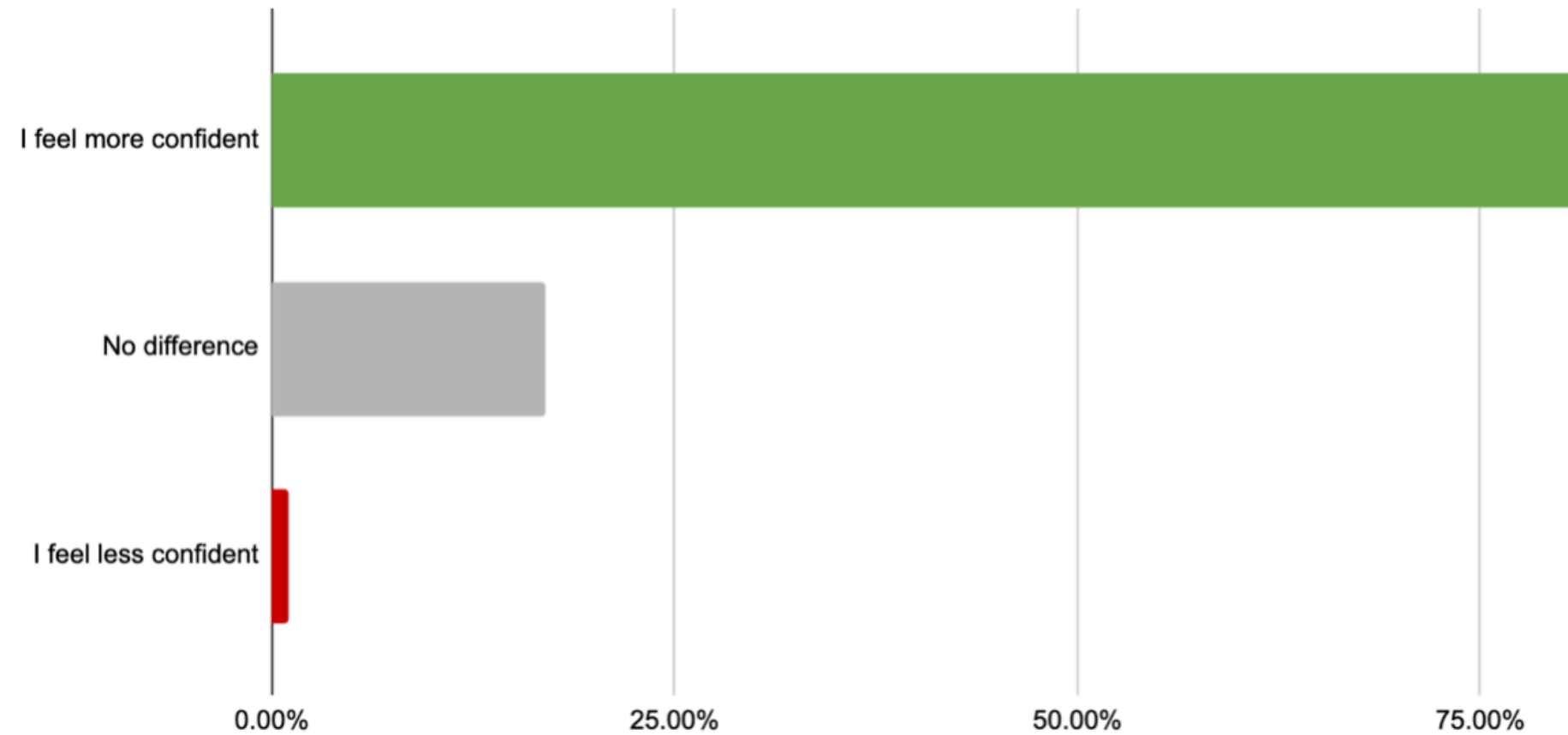
“

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.

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



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



Everything you need to improve your investing



www.stockopedia.com

Questions & Answers

Answers to any of your queries

How do I get help?

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





About the StockReports

 Written by Daniel Smith
Updated over a week ago

At the heart of Stockopedia are tens of thousands of detailed **StockReports** covering every share listed on major stock markets around the world. These single page summaries have been designed from the ground up to give the modern investor the *essential financial statistics* needed to make rapid, effective decisions.

Our design principle from the start has been to consider the ultimate goal of our users - which is to make *profitable* decisions on every stock they purchase.

To enable this goal, we've designed our StockReports to visually indicate the exposure of every stock to the factors that have been most proven to pay off in stock markets. These metrics are bundled into sections around the themes of **Quality**, **Value** and **Momentum** which we also score in our **StockRanks**, and brought to life through colour and interactive design.

We have chosen only the most powerful, predictive and *academically verified* metrics that independent research has shown to have a quantifiable impact on future stock returns. We present the data in a standardised way.

 Powered by Intercom

