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Spotlight Report - Stockopedia

Category	Key information	Notes
COVERAGE UNIVERSE		
Medal ranking – Performance of TING Basket	SILVER	A Silver medallist means the portfolio returns from our TING Basket tracking this service are beating the market. As of 31/3/23
Australian stocks covered	1829	As of 20/5/23
New Zealand stocks covered	121	As of 20/5/23
Other investment products covered e.g. Exchange traded funds, Listed investment companies, Managed funds etc.	Listed investment companies + price data for ETFs	Only financial data on Listed investment companies ("LIC") is available. There is no qualitative analysis of the investment management. Information on ETFs is limited to prices.
Investment Style	Quantitative/Data	The ultimate goal of financial quantitative analysis is to use quantifiable statistics and metrics to assist investors in making profitable investment decisions.
Primary valuation process	Stock Rank™	The StockRank™ provides a simple but effective system to discover higher expected return shares by identifying the key Factors that drive stock returns. It is an equally weighted combination of the ValueRank, QualityRank and MomentumRank. Which can likewise be reviewed as standalone Factors or by combining different groups of scores. These three basic ranks are computed for every company in the market on a daily basis, summed and then re-ranked as a percentile from 0 (worst) to 100 (best). https://www.stockopedia.com/ratios/stockrank-5378/

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Features and additional services offered		
Model Portfolios	No	Instead of Model portfolios, pre-built screens are offered under the "Screens" tab e.g., Top StockRanks, Upgrades, Downgrades, Quality Investing, Bargain Stocks, Income Investing etc.
Screening tools	Yes	A high degree of customisation offered using many of the industry standard valuation and measurement filters e.g., screen by Mkt Cap, Stock Rank, EPS Growth, DPS Growth, ROE, P/E, P/FCF etc.
Education Hub	Yes	-Stockopedia Guides (12 categories including "Getting Started" and "What's New") -Learning Resources (Videos, Ratios, Books) -Ad-hoc Education posts e.g., Technical analysis
Alerts system	Yes	• Price Alerts • Stop Loss Alerts • Fundamental Alerts • Technical Alerts
Regular member communications	Yes	-"Momentum Monday" Weekly commentary -Individual stock commentary each week (multiple releases, generally) - Education posts covering basic and advanced use of the program -Collaboration with other commentators e.g. Technical Analysis tutorials by Alan Hull - Fortnightly member newsletters – highlights of the past two weeks -"Friday Lunch" - Monthly – an open forum for members to share their ideas
Other regions or countries?	Yes (extra cost)	Extra regions can be added on to your subscription for a cost e.g. UK, Europe, United States, India, Canada, Developed Asia

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BUY AND SELL RECOMMENDATION PROCESSES		
Primary stock selection method	Stock Rank™	The StockRank is a relative indication of the attractiveness of the stock.
Measurement range or categories	A score from 1 (worst) to 100 (best)	A relative scoring system means an investor can always be "in the market" (invested in something) by owning the highest ranked stocks.
Risk management approach i.e., is guidance provided as to when to take profits or cut losses, for example.	Discretionary	An investor can build their own portfolio construction rules. For example, they may only consider stocks with a StockRank of 95 or more and exclude or sell any stocks (that drop) below that score (as we do with our TING Portfolios).
Maximum Portfolio Weighting provided	No	
INVESTMENT RESEARCH TEAM		
Key Team Members	Elio D'Amato Chris Batchelor	Elio has had a distinguished career over two decades in the finance sector and his experience spans equities research, funds management and as a business owner. A renowned market educator and commentator both domestically and internationally, Elio is a key member of Stockopedia' Australasia Team, contributing to the research, distribution and customer fulfillment. Chris is an experienced business leader and investment expert with over 25 years' experience in financial markets, focused primarily on equity investing. As part of Team Australasia, Chris contributes his expertise in working with Investment Software alongside his extensive background in educating investors. Chris is a contributor to Kaplan Professional's CPD program and is often called upon as a contributor to mainstream media.
Investment research team	2	Located in Aus/NZ
Customer Support team	2	Located in Aus/NZ. 5 located globally.
SUBSCRIPTION PRICING & INTRODUCTORY OFFERS		
Free trial offered or other introductory benefits?	• A free fortnightly newsletter • 2-week free trial	Sign up for FREE Newsletter
Cost of a 1-year subscription	$475/year	Standard rate, excluding special offers that might apply at the time.eg EOFY, Black Friday, Christmas.

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