Research System



Release Notes 2019

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Zacks Portfolio Monitor

New Report addition: Style Analysis Report

- 1. User will now be able to run a Style Analysis Report underneath the New Report tab
- 2. More information regarding the report below

	Zacks Portfolio Monitor - [12193 tes	t]						
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			% of	Di	iversification		Rel Price % Chg	
	Company	Ticker	Portfolio	TTM	TTM	3 Months	3 Months	
	3M CO		0.4%	18.1	0.8	-5.9%	-3.6%	
	ABBOTT LABS	ART	0.4%	26.2	1.2	8 3%	5.0%	
		ADI	0.0%	20.2	1.2	-0.3%	-3.5%	
		ADDV	0.5%	9.2	0.4	15.5%	17.6%	
	ABIOMED INC	ABIVID	0.0%	46.4	2.0	-35.2%	-32.9%	
	ACCENTURE PLC	ACN	0.5%	25.0	1.1	-5.3%	-3.0%	
	ACTIVISION BLZD	ATVI	0.2%	23.8	1.0	16.9%	19.3%	
	ADOBE SYSTEMS	ADBE	0.5%	42.8	1.9	-15.8%	-13.4%	
	ADV MICRO DEV	AMD	0.1%	NMN	NMN	-8.1%	-5.7%	

Charting

Relative Price Performance: Added History Toggle

Users can now change the length of history within the Relative Price Performance Chart.

- 1. Select Charts
- 2. Select Relative Price Performance

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	Price and Earnings		Zacks Rank		Price	
_	Zacks Valuation Model		N/A		\$149.61	
6.8	Relative Price/Relative Fundament		(Č		Nations	
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P/E T1	Relative Price Performance Technical	Gr →	As of	ZECPE	SP5E	ZECPE
<u>P/E</u> T	Relative Price Performance Technical Interactive Chart	Gr	As of Jun-2019	2ECPE 6.1%	SP5E 4.2%	2ECPE 9.1%
	Relative Price Performance Technical Interactive Chart Fundamental History	Gr	As of Jun-2019 Sep-2019	2ECPE 6.1% 5.4%	SP5E 4.2% 2.2%	2ECPE 9.1% 6.5%
	Relative Price Performance Technical Interactive Chart Fundamental History Valuation History	Gr Gr Gr	As of Jun-2019 Sep-2019 Fiscal Yr:	2ECPE 6.1% 5.4%	SP5E 4.2% 2.2%	2ECPE 9.1% 6.5%
P/E T1 P/E F P/FC S P/Boc P/Sale	Relative Price Performance Technical Interactive Chart Fundamental History Valuation History Treasury Yield Curve Zacks Equity Risk Premium	Gr Gr Gr	As of Jun-2019 Sep-2019 Fiscal Yr: Dec-2018	ZECPE 8.1% 5.4% 7.1%	SP5E 4.2% 2.2% 8.7%	2ECPE 9.1% 6.5%
P/E F P/FC Si P/Boc P/Sale EV/EBITDA	Relative Price Performance Technical Interactive Chart Fundamental History Valuation History Treasury Yield Curve Zacks Equity Risk Premium 19.7 15.0	Gr Gr Gr	As of Jun-2019 Sep-2019 Fiscal Yr: Dec-2018 Dec-2019	ZECPE 6.1% 5.4% 7.1% 7.3%	SP5E 4.2% 2.2% 8.7% 5.6%	2ECPE 9.1% 6.5% 7.4%

- 3. Right click on the chart in order to pull up the history options
- 4. Select the desired amount of history

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Price Action: Total Return

User now has the ability to add Total Return as a Time Series Option

1. User can select Price Action underneath the Charts Tab



2. At the bottom of the Price Action chart the user will click Edit Time Series Options

3. User can now choose to add Total Return to the Main ticker and/or Compare ticker



Company Overview Report: Standard EPS Display

Users will now be able to select to display EPS or EPS*10 within the Company Overview Report.

1. User can select Company Overview within the Charts tab

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<u>P/E T1</u>		Zacks Equity Risk	c Premium		Gr	As of		DE	Ind		DE	
P/E F	1	17.6	17.3		1	Jul-2019	-	3.4%	-0.5%		4.6%	
P/FC	E	16.7	15.4			Oct-2019		1.4%	1.3%		-6.8%	
P/Boo	k	4.5	4.2	Y/Y-1	Gr	Fiscal Y						
P/Sale	S	1.4	1.4			Oct-2018	3 2	8.8%	16.2%			



2. The Company Overview Report will be defaulted to EPS*10

- 3. The user can select Options within the Tool tab at the top
- 4. In the last tab Other the user can deselect the Display EPS*10 option

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5. This will start to display the Company Overview Report as normal EPS.



Financials

SEC Filing: Update 10Q & 10K display

Updated view for users to quickly view the most recent 10Q and 10K for a company

- 1. User can click on Financials
- 2. Under SEC Filing you can now select either 10Q or 10K to pull up the filing on the ticker being displayed in ZRS

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