

# NAIC Stock Prospector Tips & Tricks

## Modifying Previously Defined Criteria.

The below Prospector Criteria show 2 ways in which statements can be added to the canned NAIC 1 criteria to eliminate double listing of companies by restricting the Exchanges.

The first example shows a compound expression (it adds 2 lines to the original criteria) to limit selection to the NYSE and NASDAQ Exchanges.

Define screening criteria (NAIC 1 + Exchange)

Available criteria: Growth companies, NAIC 1, NAIC 2, Quality companies, Safety companies, Value companies, Dow Jones, Lab 2 Criteria, NAIC 1 + Exchange

Pro mode:  Display running totals:

| And/Or | [ | Report item      | Criteria   | ] | Records selected |
|--------|---|------------------|------------|---|------------------|
| AND    |   | Hist 10Yr EPS Gr | > .15      |   | 1606             |
| AND    |   | Hist 10Yr Rev Gr | > .15      |   | 952              |
| AND    |   | PTI Rating       | > 4        |   | 343              |
| AND    |   | Rel Value        | < 1        |   | 200              |
| AND    |   | ROE Rating       | > 4        |   | 82               |
| AND    |   | EPS R2 5yr       | > .95      |   | 32               |
| AND    | [ | Exchange         | = 'NYSE'   |   |                  |
| OR     |   | Exchange         | = 'NASDAQ' | ] | 17               |

17 out of 19043 records selected

Buttons: Pre screen, Save list, OK, Cancel

The second accomplishes the same thing with a single additional line. Note that it also adds the AMEX Exchange.

Define screening criteria

Available criteria: Growth companies, NAIC 1, NAIC 2, Quality companies, Safety companies, Value companies, Dow Jones, Lab 2 Criteria, NAIC 1 + Exchange

Pro mode:  Display running totals:

| And/Or | [ | Report item      | Criteria                      | ] | Records selected |
|--------|---|------------------|-------------------------------|---|------------------|
| AND    |   | Hist 10Yr EPS Gr | > .15                         |   | 1606             |
| AND    |   | Hist 10Yr Rev Gr | > .15                         |   | 952              |
| AND    |   | PTI Rating       | > 4                           |   | 343              |
| AND    |   | Rel Value        | < 1                           |   | 200              |
| AND    |   | ROE Rating       | > 4                           |   | 82               |
| AND    |   | EPS R2 5yr       | > .95                         |   | 32               |
| AND    |   | Exchange         | in ('NYSE', 'NASDAQ', 'AMEX') |   | 18               |

18 out of 19043 records selected

Buttons: Pre screen, Save list, OK, Cancel

After making this change, it would be prudent to save the modified criteria as "NAIC 1 + Exchange".