

Crow River Stock Profile Sheet

Prepared by: _____

Date _____

Basic information	Stock Selection Guide Review
Company Name & Ticker: _____	Current Price: _____
Sector/Industry: _____	Debt-to Capital: _____
Type of Holding? _____ Long _____ Short _____	Section 1 shows consistency last 1-3 years? ___ Pass ___ Fail _____
Optionable? _____ Yes _____ No _____	5-yr Pre-Tax Profit Trend : _____ Up _____ Even _____ Down _____
Next Earnings Date: _____	Pert A Graph Trend: _____

Estimates/Growth Rates	Ratings
Yahoo Current Yr EPS \$ _____ Next Yr EPS \$ _____	Navellier 3-letter Rating _____
Yahoo 5-yr EPS Growth Estimate & P/E _____ % _____	MSN Stock Scouter Rating _____
Manifest 5-yr EPS Estimate \$ _____ 5-yr Avg. P/E _____	Value Line Industry Timeliness Rating _____
Value Line 4-yr EPS \$ _____ 4-yr projected P/E _____	Value Line Stock Timeliness Rating _____
Finviz 5-yr EPS Growth Estimate _____ % _____	Manifest Quality Rating _____

Competitors
Compare stock to the Industry and S&P500 on Bigcharts.com. Is the industry beating the market? Is the stock beating the industry? Comments: _____
Compare stock to its peers on SmartMoney.com. Looking for high Projected EPS Growth and low PEG among peers. Comments: _____

Technicals	
<p>First, review the chart & company report on Finviz.com</p> <p>Is the stock in an identifiable uptrend? _____ Yes _____ No _____</p> <p>Where is the channel support \$ _____ resistance \$ _____</p> <p>Where is the stock in relation to the:</p> <p>20 dSMA _____ % 50 dSMA _____ % 200 dSMA _____ %</p> <p>52 Week High \$ _____ 52 Week Low \$ _____</p> <p>PEG _____ Beta _____ RSI _____</p> <p>Current Volume _____ Average Volume _____</p> <p>Note in the thesis anything important on the Finviz company report</p>	<p>Second, review multiple-year charts on StockCharts.com</p> <p>What is the highest price in the last 3 years \$ _____</p> <p>What is the lowest price in the last 3 years \$ _____</p> <p>Where is recent support \$ _____ resistance \$ _____</p> <p>Where is the 50 dSMA \$ _____ 200 dSMA \$ _____</p> <p>MACD Histogram _____ Above _____ Below _____</p> <p>MACD Histogram 30 day trend ___ Up ___ Down ___ Number _____</p> <p>Chaiken Money Flow ___ Above ___ Below ___ Number _____</p> <p>New P&F Pattern reported last 30 days? _____ Yes _____ No _____</p>

Commentary/Research Reports
Review the analyst commentary in publications, such as <input type="checkbox"/> Value Line, <input type="checkbox"/> Morningstar, <input type="checkbox"/> Standard & Poors, and <input type="checkbox"/> Argus Reports, etc. In the thesis, note anything newsworthy such as drivers of future growth, and anything that would make us buy or sell.

News/Articles
Search for news and articles that may shed some light on the company and its industry on websites, such as <input type="checkbox"/> Yahoo Finance, <input type="checkbox"/> Finviz, <input type="checkbox"/> MSN Money, <input type="checkbox"/> Barron's, <input type="checkbox"/> Wall Street Journal, <input type="checkbox"/> Seeking Alpha, <input type="checkbox"/> Fortune, <input type="checkbox"/> Motley Fool, <input type="checkbox"/> Company press releases, etc. Note in the thesis anything newsworthy that would help us better understand the company and industry.

What is our Buy Below? \$ _____ What is our Sell Above? _____

Thesis/Notes	Sale of Option																																																																																						
	<p>Covered Call ___ Cash-Secured Put ___ Date of Sale _____</p> <p>Underlying Stock Price \$ _____ Expiration Date _____</p> <p>Strike Price \$ _____ Premium \$ _____</p> <p>Delta _____ Implied Volatility _____</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #e0f2f1;"> <th colspan="2" style="text-align: left; padding: 2px;">CALL OR PUT</th> </tr> </thead> <tbody> <tr><td style="padding: 2px;">Trade date</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Expiration date -</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">= # of days</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Strike price</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">x 100 (1 contract)</td><td style="padding: 2px;">x</td></tr> <tr><td style="padding: 2px;">= Market value</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Premium</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">x 100 (1 contract)</td><td style="padding: 2px;">x</td></tr> <tr><td style="padding: 2px;">= Total premium</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">Less commission</td><td style="padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">= Net profit</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;"><u>If it expires:</u></td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Net profit</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">div. by Market Val.</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">= % Short term profit</td><td style="padding: 2px;">%</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">% Short term profit</td><td style="padding: 2px;">%</td></tr> <tr><td style="padding: 2px;">div. by #/days x 365</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">= Annualized profit</td><td style="padding: 2px;">%</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Covered Call</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;"><u>If called away:</u></td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Strike price</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">x 100 (1 contract)</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">Total price received</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">less cost basis -</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">Capital gain</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Capital gain</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">plus option net profit</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">+</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;">Total net profit</td><td style="padding: 2px;">\$</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Total net profit div.</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">by #/days x 365 =</td><td style="padding: 2px;"></td></tr> <tr><td style="padding: 2px;">Annualized return</td><td style="padding: 2px;">%</td></tr> <tr><td style="padding: 2px;"> </td><td style="padding: 2px;"></td></tr> </tbody> </table>	CALL OR PUT		Trade date		Expiration date -		= # of days				Strike price	\$	x 100 (1 contract)	x	= Market value	\$			Premium	\$	x 100 (1 contract)	x	= Total premium	\$	Less commission	-	= Net profit	\$			<u>If it expires:</u>				Net profit	\$	div. by Market Val.	\$	= % Short term profit	%			% Short term profit	%	div. by #/days x 365		= Annualized profit	%			Covered Call		<u>If called away:</u>				Strike price	\$	x 100 (1 contract)	\$	Total price received	\$	less cost basis -	\$	Capital gain	\$			Capital gain	\$	plus option net profit		+	\$	Total net profit	\$			Total net profit div.		by #/days x 365 =		Annualized return	%		
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