



# **Standard & Poor's STOCKPAK and Portfolio Management System**

**Cat. No. 26-1**

**Suggested Retail Price (may vary at individual stores and dealers) \$49.95**

## **Description**

This unique and exclusive software package not only contains a "stand-alone" portfolio management system, but more importantly, it is the software required to use Standard & Poor's monthly STOCKPAK Common Stock Data Service (available to TRS-80 owners on a subscription basis). This software and the S&P Data Service combine to offer one of the most powerful and versatile computerized common stock selection systems available to the average investor.

## **Format**

Furnished on diskette, in an attractive binder with extensive instructions prepared for you by Standard and Poor's. Also included is one month's sample information from the S&P STOCKPAK Common Stock Data Service (note — this will not be the current month), so you can see how the system software works with that service.

## **Minimum Hardware Required**

- 16K, Level II TRS-80 Model I computer
- 16K Expansion Interface
- Two TRS-80 Mini Disk Drives
- Optional Printer, capable of 80 characters per line, and cable

## **Detailed Description**

The STOCKPAK system software offers an extensive set of facilities that give you a great deal of control over the information. Functionally, the system will:

- allow you to define and manage your own personal Stock Portfolio information, and if you're a subscriber, apply it against the S&P STOCKPAK Common Stock Data Base. Areas of analysis include dividend yield, diversification, risk, performance, etc.
- provide access to and management of the monthly S&P STOCKPAK Common Stock Data Base.
- allow you to specify or define calculations and functions such as Price to Earnings ratio, Return on Sales, etc.
- provide an analyst with an opportunity to screen the group of companies he/she wishes to work on by means of simple criteria statements. Applicable analyses are in areas of stock purchase or sale, merger and acquisition, option purchase, etc.
- include a facility to store and manage any subset of S&P Common Stock information in subscriber-defined data files.
- permit you to format, generate and print a report on any set of securities.

**\*Stock Selection System**

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Each month, STOCKPAK subscribers will receive one floppy diskette, containing about 30 items of information on approximately 900 common stocks. The information will include current data for each company.

Using this system, you may screen the 900 stocks, choosing those which meet your specified conditions or criteria. These criteria may include one or more conditions . . . Price/Earnings ratio of less than 10, Return on Equity greater than 15%, or some set of calculations you define. (You can even define your own types of calculations, and store them in the system for later use.) Once a set of Stocks has been selected according to your criterion, you can set it up as a separate data file for continuing use, and of course you can print a report. Another unique feature of this system is that reports are printed the way you want them. You pre-define just how each report will look, then you can store the report formats in the system for later use.

In managing a personal Stock Portfolio, simply tell the system you want to set up a portfolio. It will prompt you to enter your information—date of purchase, number of shares, price, etc. It will also ask you what other items of information you want to keep. All system operation is highly interactive, normally requiring you to simply answer questions asked by the TRS-80. Your stored information may be continually updated, analyzed, or used to generate printed reports. If you subscribe to the S&P STOCKPAK Data Service, you may also compare the performance of your portfolio to any selected group of stocks you choose.

Additionally, STOCKPAK Data Service subscribers will receive with their diskette a monthly newsletter highlighting important financial news and investment strategies.

An annual subscription to this service will cost \$200.