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How to use Financial Analyzer

IGS is one of the only software, which provides financial data analysis, which includes key ratios, important parameters etc. For eg: you are looking for financial scanner, which can give you EPS result for last few quarters and you should be able to compare them at one stop shop for multiple companies.

Here are the steps to accomplish that:

Step 1: Get the financial data from the website (you can choose your choice of website, which gives fundamental information on the website.

Step 2: Get the required information in a file format using IGS data utility (or user can use 3rd party utility, IGS provides a utility to get the data in IGS compatible format)

Step 3: Once you get all the data copy the files in results directory of IGS installation directory. (IGS Utility will do automatically for you)

Please note: The format of file:

1. File name should be <symbol>.txt

2. File must be in result directory

Step 4: All parameters you want to use (say EPS, PE Ratio, Net profit etc) must be used as indicators in SQL engine.

Now suppose if you want print EPS of current quarter then we need to write EPS[0;0], where first value (red) is current quarter, so for next quarter write EPS[1;0].

Here is an example:

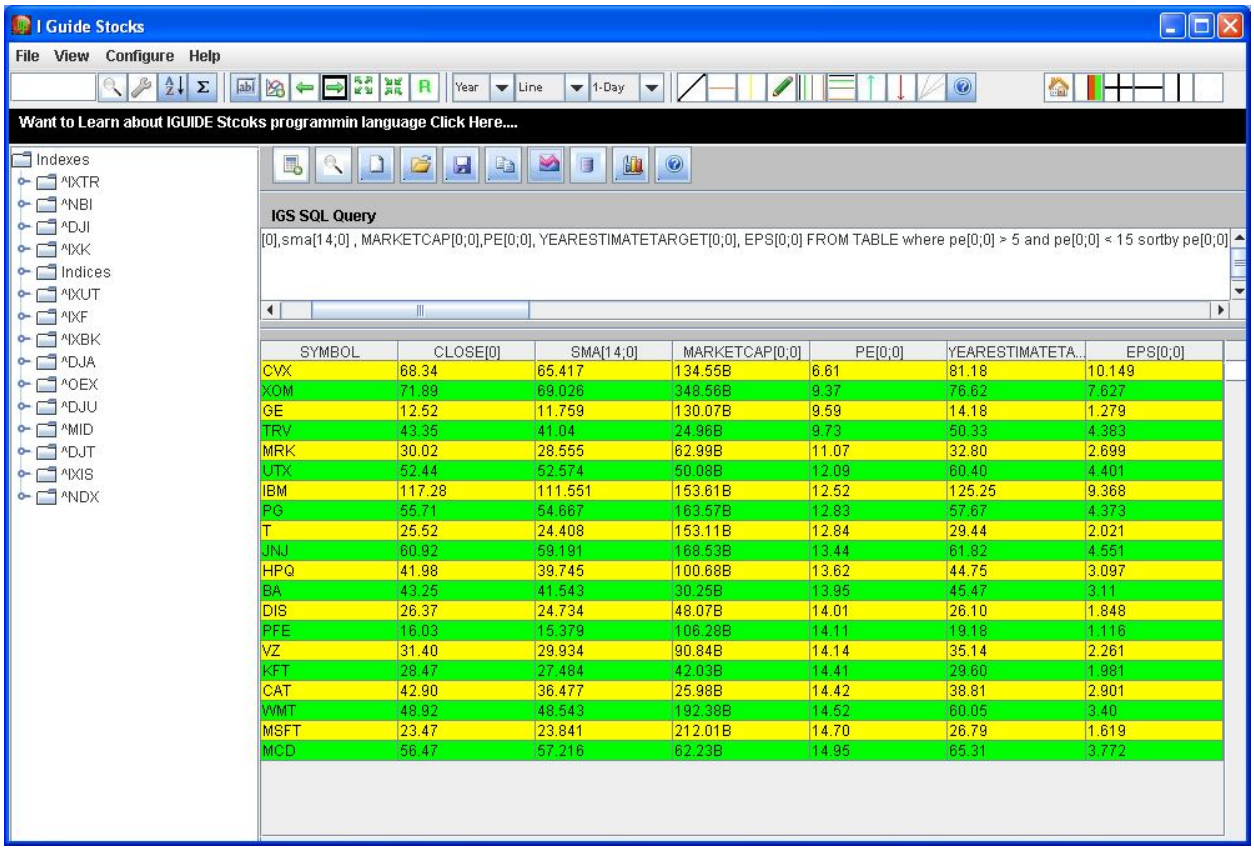
Suppose you have MARKETCAP, PE, YEARESTIMATETARGET, EPS in the raw file that is you get from a specific website. Now to scan this data for each stock, write below query in IGS Query engine

Select symbol, MARKETCAP[0;0],PE[0;0], YEARESTIMATETARGET[0;0], EPS[0;0] FROM TABLE

Now suppose you want to add some indicators and also want to restrict your query to only Stocks which has PE Ratio between 5 to 15

Select symbol, CLOSE[0], SMA[14;0] , MARKETCAP[0;0], PE[0;0], YEARESTIMATETARGET[0;0], EPS[0;0] FROM TABLE where PE[0;0] > 5 and PE[0;0] < 15

Here is the results screen



SYMBOL	CLOSE[0]	SMA[14;0]	MARKETCAP[0;0]	PE[0;0]	YEARESTIMATETA...	EPS[0;0]
CVX	68.34	65.417	134.55B	6.61	81.18	10.149
XOM	71.89	69.026	348.56B	9.37	76.62	7.627
GE	12.52	11.759	130.07B	9.59	14.18	1.279
TRV	43.35	41.04	24.96B	9.73	50.33	4.383
MRK	30.02	28.555	62.99B	11.07	32.80	2.699
UTX	52.44	52.574	50.08B	12.09	60.40	4.401
IBM	117.28	111.551	153.61B	12.52	125.25	9.368
PG	55.71	54.667	163.57B	12.83	57.67	4.373
T	25.52	24.408	153.11B	12.84	29.44	2.021
JNJ	60.92	59.191	168.53B	13.44	61.82	4.551
HPQ	41.98	39.745	100.68B	13.62	44.75	3.097
BA	43.25	41.543	30.25B	13.95	45.47	3.11
DIS	26.37	24.734	48.07B	14.01	26.10	1.848
PFE	16.03	15.379	106.28B	14.11	19.18	1.116
VZ	31.40	29.934	90.84B	14.14	35.14	2.261
KFT	28.47	27.484	42.03B	14.41	29.60	1.981
CAT	42.90	36.477	25.98B	14.42	38.81	2.901
WMT	48.92	48.543	192.38B	14.52	60.05	3.40
MSFT	23.47	23.841	212.01B	14.70	26.79	1.619
MCD	56.47	57.216	62.23B	14.95	65.31	3.772

Now you want to sort the result based on percentage difference between current price and yearly estimated price. Write a small one line code and save it directory by name diff

Diff1 := 100 * (YEARESTIMATETARGET[0;0] – close[0]) / close[0]

Here is the final query:

Select symbol CLOSE[0], YEARESTIMATETARGET[0;0], DIFF1 FROM TABLE where diff sortby -1 * DIFF1

This query will call diff function which will include diff1 variable in our query .

This query shows how can we synergize fundamental data with technical data and get better results.

Here is the output screen