ChartMill Manual V.1

Hello and thank you for joining the Chartmill Family!

ChartMill offers a comprehensive set of technical and fundamental tools for individual investors looking to manage their own portfolios.

We sincerely believe that the ChartMill stock screener is one of the most versatile screeners on the market, suitable for a wide range of strategies.

Whether you use technical analysis for short-term day or swing trading, fundamental analysis for long-term growth, value, quality, or dividend investing, or combine both for growth-position trading, we've got you covered!

We're going to do everything we can to get you up and running with ChartMill as quickly as possible.

After all, the amount of data that goes into our stock screener and the screening capabilities that result are immense.

Masses of data alone, however, are no guarantee of success. The degree to which you can use the software to quickly, easily, and efficiently find quality setups for your strategy all the more!

This user manual will get you up and running quickly in that regard. We are going to make sure that you know how to make the most of the numerous features in ChartMill so that using the screener becomes an essential part of your daily workflow.

It will completely change your perspective on how to screen!

How To Get Started With ChartMill? User Manual

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What To Expect?

The course is divided into 9 chapters with the following content:

Chapter 1 - Why a stock screener like ChartMill? - *Page 5*

In this first lesson, we briefly explain the main advantages of using a screening tool compared to screening manually.

We reveal a first simple combination screen to scan growth stocks in an uptrend.

Chapter 2 - Managing Your Personal ChartMill Settings - *Page 12*

We demonstrate one way to view the results from the previous screen and save these settings for later use. We also cover other options for personalizing specific default settings.

Chapter 3 - The Power of Predefined Trading Ideas - *Page 21*

ChartMill has a large number of prebuilt screening filters called 'Trading Ideas'. These are available for both the fundamental investor and technical trader and even for those using a strategy that combines technical and fundamental analysis.

You can use these off-the-shelf or you can adopt them as a base and tweak them to your own needs.

Chapter 4 - Building a Screen from Scratch - *Page 34*

This lesson is for those who like to roll up their sleeves and prefer to start from scratch to design their own screens.

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How do you start designing a personal screen? What should you pay attention to and more importantly, what are some mistakes you should try to avoid? You will learn it all on day 4 of this course!

Chapter 5 - Analyzing and Comparing Results - *Page 44*

The focus of this lesson is on how to view and manage the results of your screens by using one or more watchlists and associated alarms that keep you informed promptly.

We will also give a brief overview of the different ways you can view and sort your results in ChartMill.

Chapter 6 - Designing a Custom View - *Page 57*

Even with the many predefined view options, you may find yourself looking for a view that is composed slightly differently than the available default options.

Fortunately, ChartMill allows you to build complete custom views. In this comprehensive tutorial, we'll show you how to get started using a full custom view example.

Chapter 7 - Designing a Custom Screen Filter - *Page 71*

As is the case for the various view options, ChartMill also allows you to customize individual screening filters to some extent.

It is probably the most difficult part of the screener, which is why we would like to spend a full lesson on it.

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Chapter 8 - Sectors and Industries: Finding the strongest performers - *Page 84*

Being able to spot which sectors and industries take the leadership role in the first stage of a new uptrend is crucial to quickly position yourself in those stocks that hold the most potential.

In this lesson, we'll show you what options are available for that purpose in ChartMill.

Chapter 9 - Now it's up to you! - *Page 93*

By following the previous 8 lessons, you should now be able to use the basic functionalities in ChartMill.

If you are still not sure which investment style suits you best, in this last email we would like to assist you further with some interesting links to different basic strategies and the corresponding trading ideas available in ChartMill.

Are you ready?

As I'm sure you have already noticed, there is a lot on the program. Please take your time to go through each lesson thoroughly.

The great advantage of this course is that you can go through each lesson entirely at your own pace.

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Why a stock screener like ChartMill?

Covered in this first lesson:

- I'll explain to you why it's useful to use a screener and what the advantages are over purely manual screening.

- You get an example of an initial screen that looks for typical growth stocks, which we then expand with some technical trend filters to arrive at a simple combination screen.

But why use a screener in the first place?

There are several reasons to use a stock screener when searching for the right stocks:

- It is the easiest and fastest way to find the right stocks for your strategy. Screening the markets does take some time, so you want to be efficient.

- Using a screener is a crucial part of a complete workflow that allows you to scan the market each day or week for the best setups.

- The results produced by the screeners are an important indicator to keep in touch with the prevailing market trend and market sentiment.

Now let's take a closer look at each of those points.

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Finding the right stocks

Whether your investment strategy is based on technical or fundamental analysis (or a combination of both) does not matter. The important thing is that the stocks you are targeting match your strategy in the best possible way and that the price is at a point where it becomes an interesting setup to take a position.

A screener offers the advantage that those criteria are determined in a completely objective manner.

One of the biggest disadvantages of manual screening is precisely a lack of objectivity. Unconsciously, one is too easily led by tips on social media or forums. Of course, there can sometimes be some good ideas among them but the question is whether that is consistent with your investment strategy?

Another danger is that while manually screening, you are more likely to withhold stocks that a screener would not select. This occurs especially when market conditions are not ideal for your way of trading.

You then barely find setups that meet your rules. A screener is unrelenting in that case and may sometimes give no results at all. When screening manually, the chances are much higher that you will withhold stocks of inferior quality just to be able to trade. This is detrimental to your long-term results.

Saving time

One of the most obvious advantages of using a screener is, of course, the time you save with it. ChartMill has nearly 22500 tickers in its database. Searching such a large group of stocks manually is hardly doable and takes a lot of valuable time.

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A screener allows you to arrive at a selection of a few hundred stocks that specifically fit your investment style with just a few simple basic filters.

Consistency

Integrating a stock screener into your daily trading routines makes your workflow a lot more consistent and efficient. It ensures a lower margin of error, and that does have a positive impact on your long-term success in the stock market.

Recognizing market sentiment and trend

Being able to soundly assess general market conditions and having an overall picture of the short- and long-term trend is crucial to evaluating the potential of one's own used strategy.

After all, no strategy works in all market conditions. For example, a typical breakout strategy will do very well in rising market conditions where momentum is high. But a lot of breakouts will fail if the overall market is rather bearish.

Your screens are an important indicator here. For example, suppose you have a breakout screen that shows all stocks in a positive trend whose closing price is higher than the highest price in the past 20 days.

If you start to notice that this screening filter produces (much) less results than normal, that is a sign that the positive market trend is losing momentum. This will make you more wary and more likely to tighten your stop loss on some of your open positions.

If the number of setups suddenly increases, that in turn is evidence that more and more stocks are following the broad bullish market and their price is moving higher along with it. That could be the ideal time to put the

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remaining cash to work and increase your risk% a bit if your maximum exposure has not yet been reached.

Building your first screen

Now that we know the many advantages of a stock screener, it is time to put together a first simple basic screen. Creating a screen starts from an idea on which your trading strategy is based.

Let's assume for a moment that you are a swing trader looking for setups in typical growth stocks whose trend is bullish.

To find those types of companies you have retained the following characteristics in your trading plan:

- *US companies with a minimum market capitalization of 300 million and a minimum price of $5*
- *Daily average trading volume of at least 500,000 units*
- *Strong sales and earnings growth on both a quarterly and annual basis*
- *Substantial growth in cash flow*
- *Long-term and short-term price trends bullish*

We will now build this screen with a combination of general, fundamental, and technical filters.

Let's start with some general filters:

- *Stocks: US only*
- *Type: Common Stocks only*
- *Minimum Price: $5*
- *Market Cap: At Least Small Cap (300M+)*

- *Volume: At Least an average daily volume of 300.000 (measured over the last 50 trading days)*
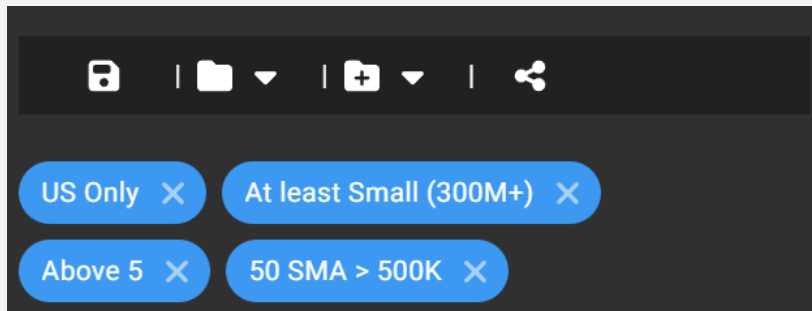
Next, we move on to the requirements regarding revenue growth, profit growth, and cash flow:

- *Revenue 1Y >= 20%*
- *Revenue Growth Q2Q >= 20%*
- *EPS 1Y >= 15%*
- *EPS Growth Q2Q >= 15%*
- *FCF Growth 1Y >= 15%*

Finally, we need to add some pricing parameters that will ensure that ChartMill only holds stocks that are in a clear uptrend.

We use two moving averages for this purpose:

- *SMA(50) Rising*
- *SMA(200) Rising*
- *Price Above SMA(50)*
- *Price Above SMA(200)*
- *SMA(50) Above SMA(200)*

The number of results this screen produces depends on market conditions. The trend filters that were added will obviously play a big role in this.

This relatively simple screen is already a great example of how you can create a powerful screen in just a few clicks with well-known names such as Crowdstrike Holdings (CRWD), Novo Nordisk (NVO), Arista Networks (ANET), Shopify (SHOP), Datadog (DDOG) and many others (from the screen results as of January 09, 2024).

Save the screen so you can reuse it at a later time with just one click.
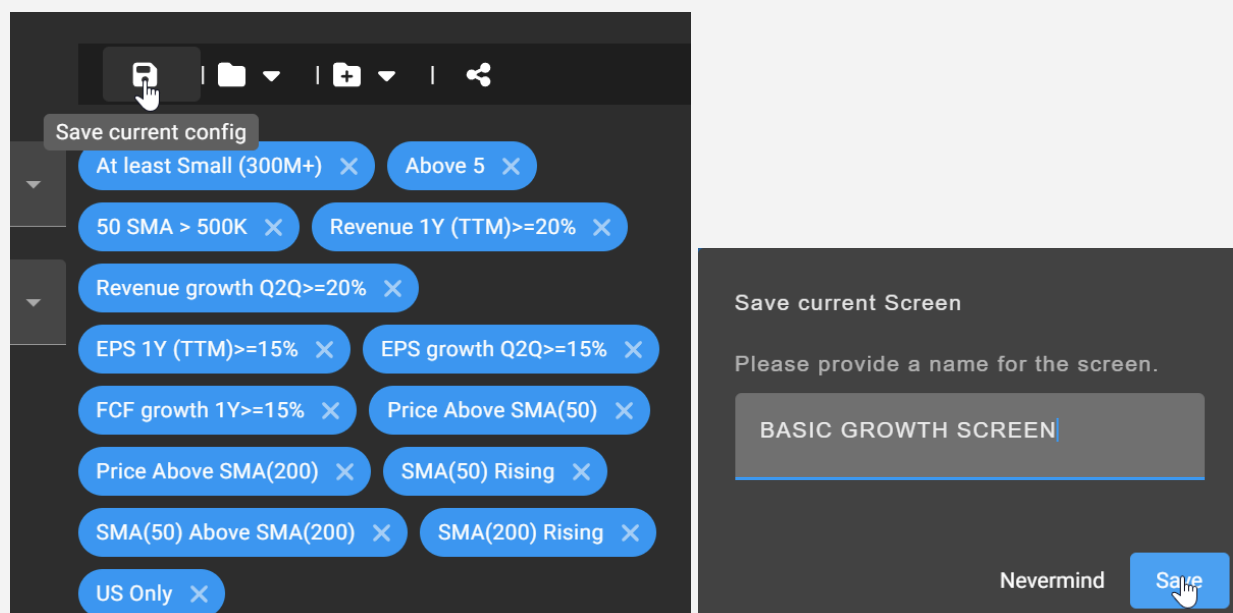
To do this, click on the floppy disk icon. In the next screen, enter a name for this screen (i've used 'Basic Growth Screen') and click 'Save'.

Key Takeaways

There are many advantages to using a stock screener. Focusing only on the best setups and the time saved over manual screening are obvious.

A screener allows you to work in a more structured way because it is part of a specific workflow that you can repeat at regular intervals.

Some screens give you early indications about the end or beginning of a trend, depending on the number of results the screener generates. That information can be useful in deciding whether to open new positions and manage existing ones.

The basic growth screen shown above makes it clear that the power of a screener lies mainly in combining several fundamental and technical filters, giving you in no time a basic list of stocks that perfectly meet your required criteria.

In the chapter, we will explain - based on this screen - how to view the results and how to manage your default settings in ChartMill to do so.

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Managing Your Personal ChartMill Settings

In this section, we pick up where we left off in chapter 1, at the basic growth screen we used to instruct ChartMill to find typical growth stocks that are in a positive trend.

We'll look at the results of that screen using charts showing the various moving averages that we used in the screen itself to determine the trend.

Then we are going to save those settings in our account so we can quickly select them later when viewing all kinds of screen results. We can even use specific settings as a default view.

If you have not yet saved the screen from the previous lesson, you can open this link and do so.

View and Chart Settings
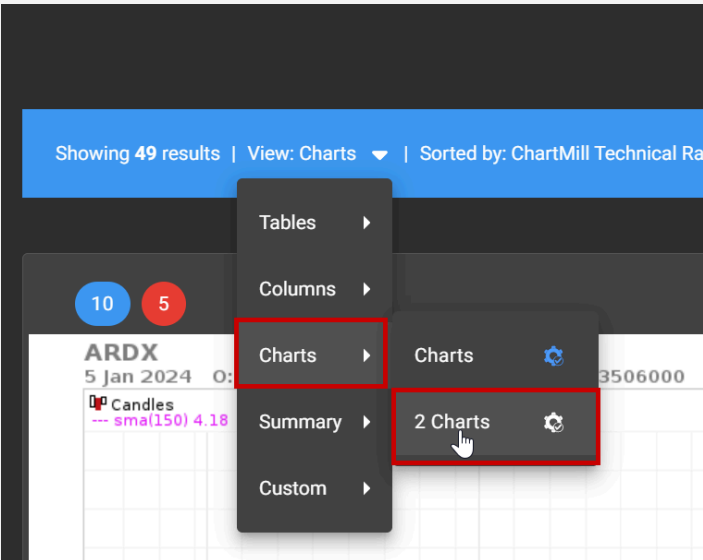
To view the results we use the option '2 Charts'.

This is done by clicking the inverted triangle next to 'View' in the blue horizontal bar.

A dropdown menu will open. Click on 'Charts' and then '2 Charts'.

As you will notice, there are numerous other ways to view the results but we will come back to that in detail in one of the next lessons.
Next, select the 'Chart Settings' tab.
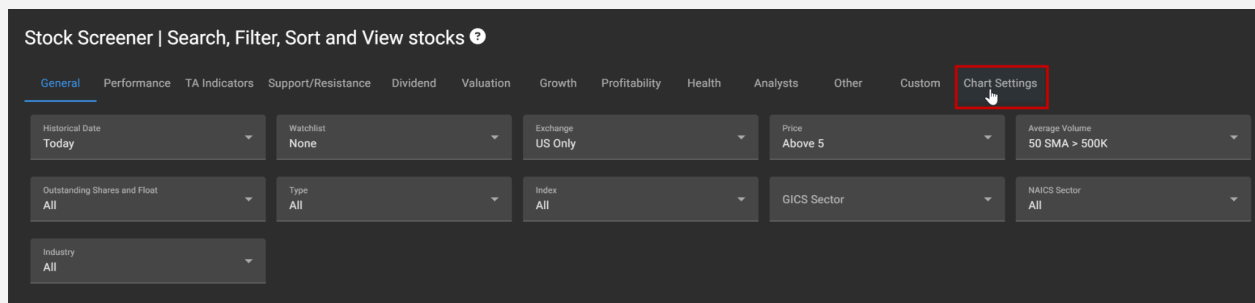
On the next page, you can now adjust the settings for the main and secondary charts. Be sure to remove any indicators and overlays still visible by clicking the cross next to them.

In terms of timeframe, I prefer 'Daily' for the main chart and 'Weekly' for the secondary chart. I'm using 'Bars' but you can also choose other options here.
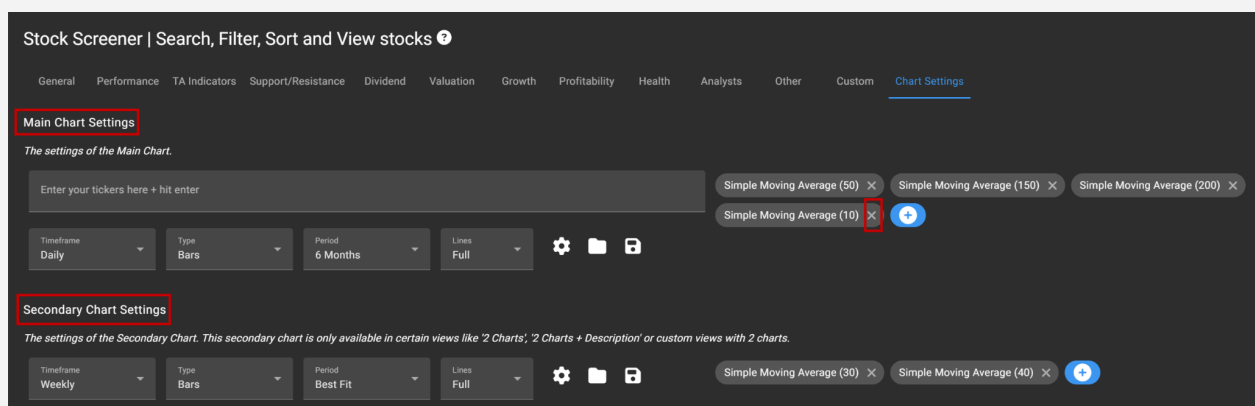
In terms of timeframe, I use 4 months for the daily chart and the 'Best Fit II' option for the weekly chart.
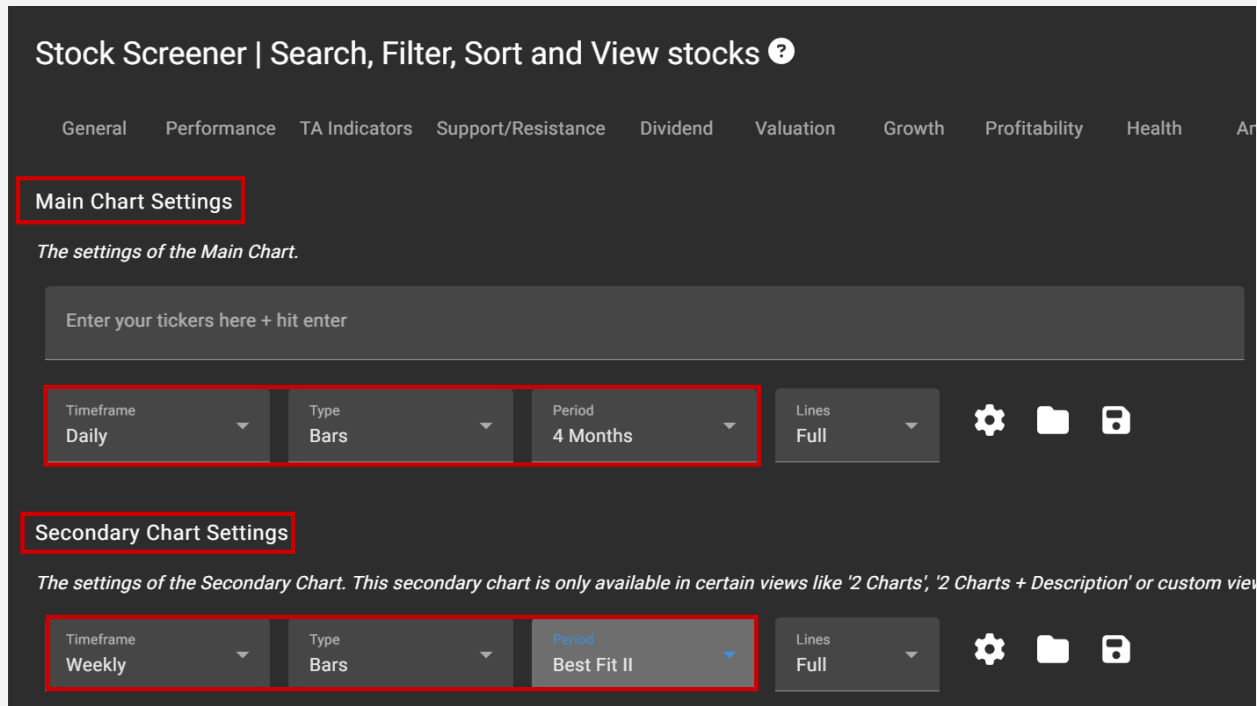
For the main chart, I then add the SMA(200) and SMA(50). To do so, click on the blue plus sign, choose 'Overlay', and then select 'Simple Moving Average'.
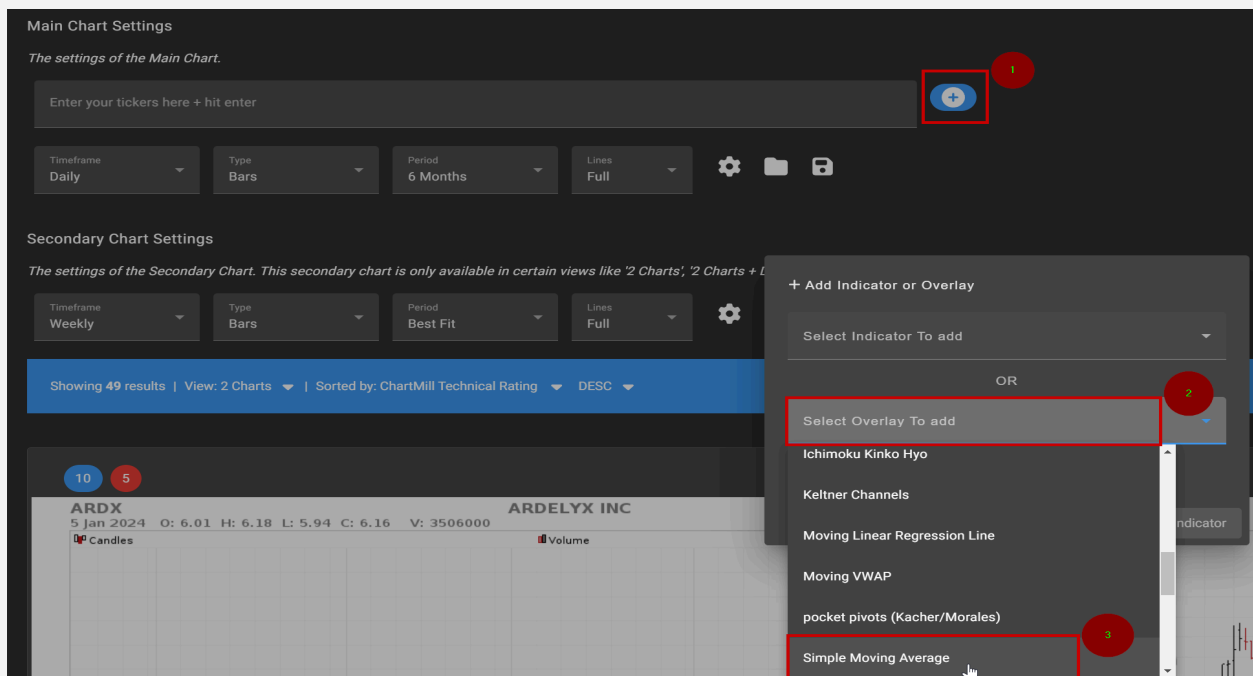
In the next screen, specify the 'Look Back Period' and choose a color after which you click 'Add Indicator'.
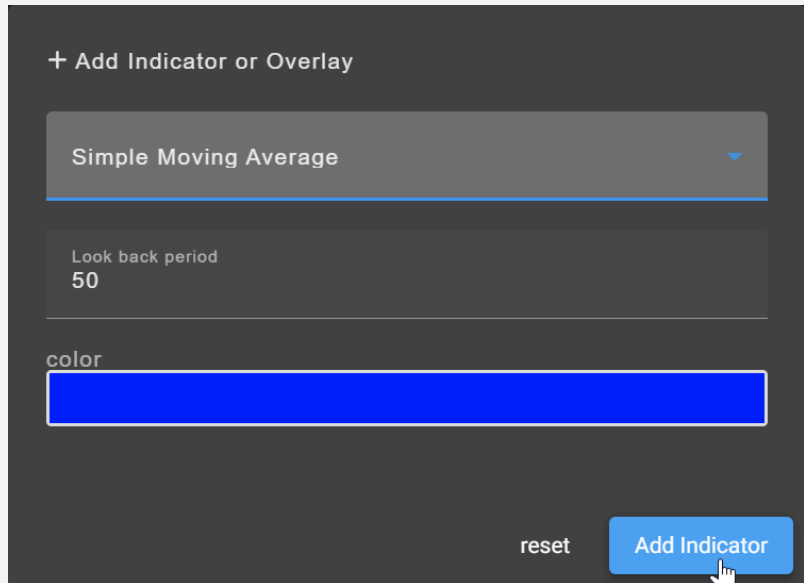
Repeat these actions for the SMA(200). Your screen should now look like this:
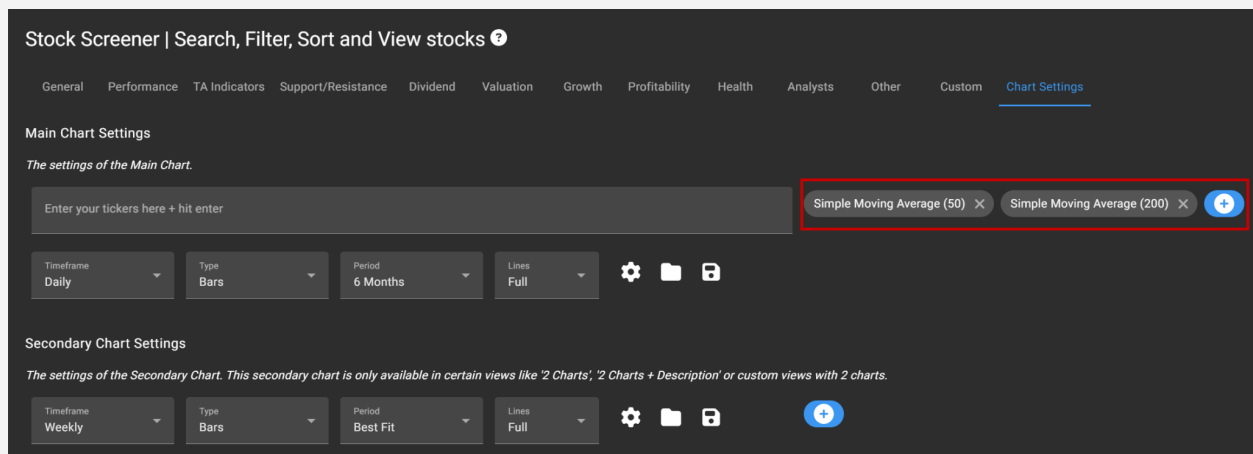
To save these Main Chart Settings, click on the floppy disk icon shown in the image below.

Give a name for these specific view settings and save them. In the example below, I used *"Standard Daily View"* as the name for these settings.
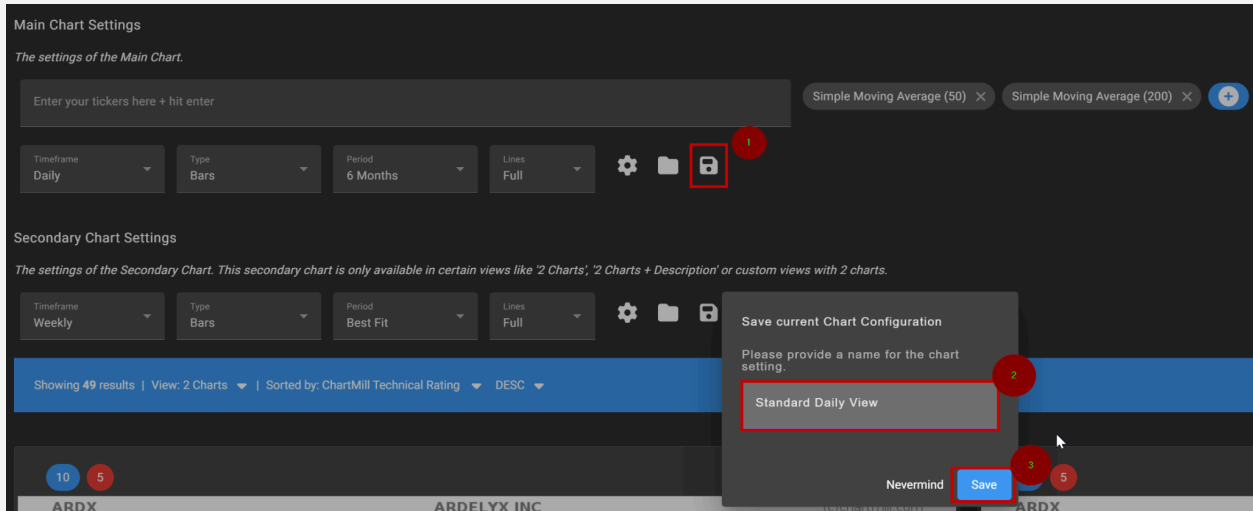
Now repeat this step-by-step process for the Secondary Chart Settings. In the example screen below, I have retained the SMA(30) and SMA(40) for this purpose (on a weekly chart, this corresponds to a 150 and 200-day daily average).

Also, save these settings for the secondary chart with a name of your own choosing (for example 'Standard Weekly View').

If you followed the steps above, your screen should now look like this:
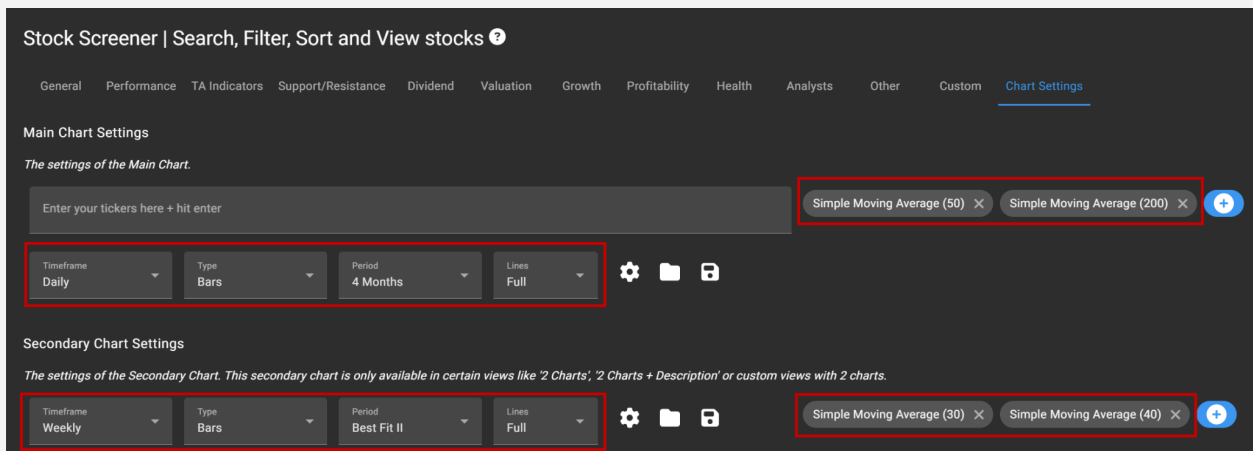
Finally, we are going to adjust some settings in the blue horizontal bar. The View '2 Charts' was already selected earlier. In addition, you can change the way ChartMill sorts the results.

By default this is set to *'ChartMill Technical Rating'* but there are loads of other options when you open the dropdown menu. I choose to display the results based on their *'Market Capitalization'*, showing the companies with the largest market capitalization first.

To do so, select 'Description > Market Cap' from the dropdown menu next to 'Sorted by:'.

A very handy feature can be found at the end of the blue bar.
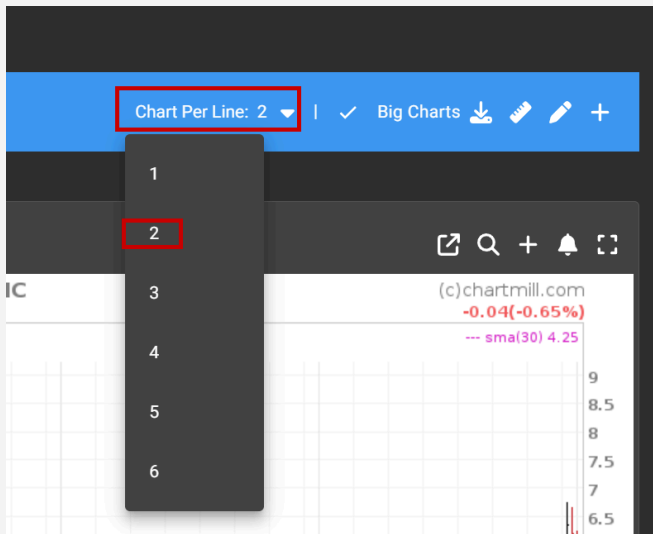
This is where you can choose how many charts ChartMill should display side by side.

The most logical option here is to show 2 charts side by side.

The daily chart of each ticker is now shown on the left and the weekly chart on the right, showing their indicators and overlays.
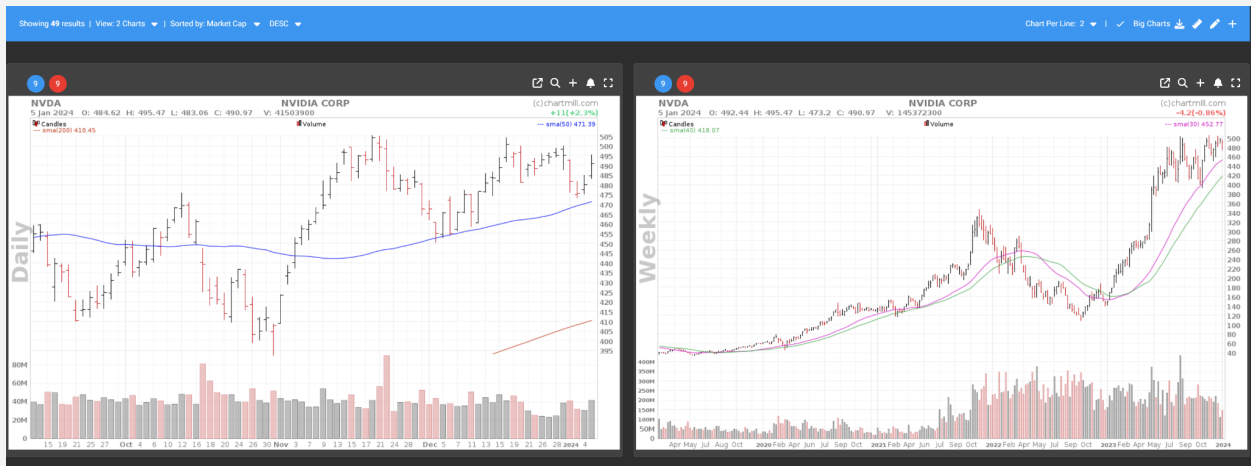
Personal ChartMill Settings

Now that we've saved an initial screen and a specific view setting, it's time to set some basic settings on the account page for future use.

First open your account page. To do so, click on your username in the upper right corner and then on *'My Account'.*

On this page (see below), you can adjust and manage a lot of settings.

For this lesson, we will continue with the options listed in the red box.
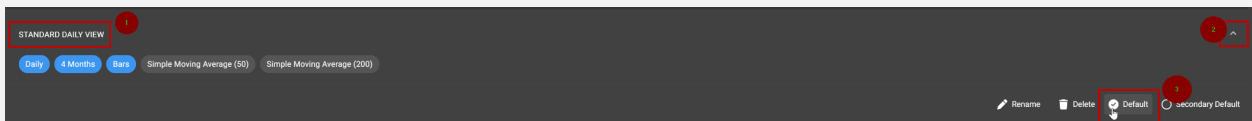
Chart Settings

This is where we find the settings we saved for the main and secondary charts. If you have saved other chart settings before, they will also be visible here.
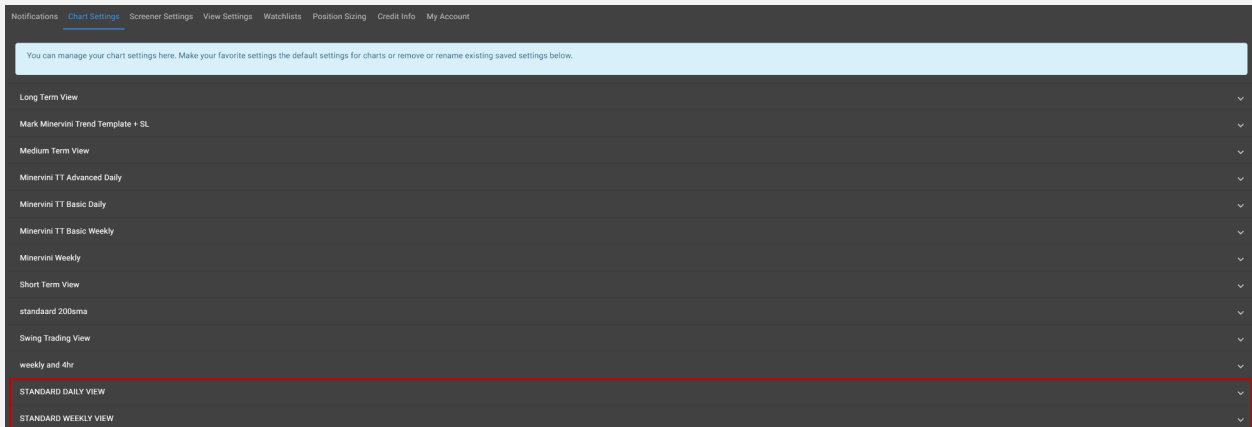
As an example, we are going to set the previously created *'Standard Daily View'* as default so that ChartMill will show this view every time we open a chart as the main chart.

To do that, click on the inverted triangle on the far right next to *'Standard Daily View'* and choose the default option.

Close by clicking the triangle again.

Next, open the *'Standard Weekly View'* and select the Secondary Default option. This will ensure that when ChartMill displays a secondary chart (as in the 2 charts view) these settings will be the default.

Afterward, also close this chart setting and reload the page to make sure the new settings are loaded.

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Now as soon as you select the *'2 Charts'* view on the stock screener or stock charts page you will see the chosen default settings.

Screener Settings

Below you will find all your created screens, including the *'Basic Growth Screen'* we created in lesson 1.

By clicking again on the inverted triangle you will be shown all individual filters of that screen. You can change the screen name, delete it, or set it as 'default' so this screen will be loaded by default every time you open the stock screener page.
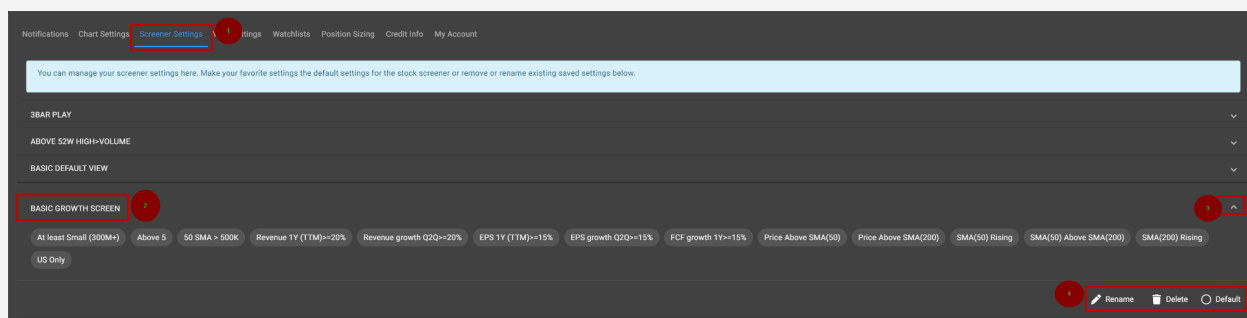
Position Sizing Tool

The watchlists section will be covered in detail later. We will continue with the Position Sizing section in this lesson.
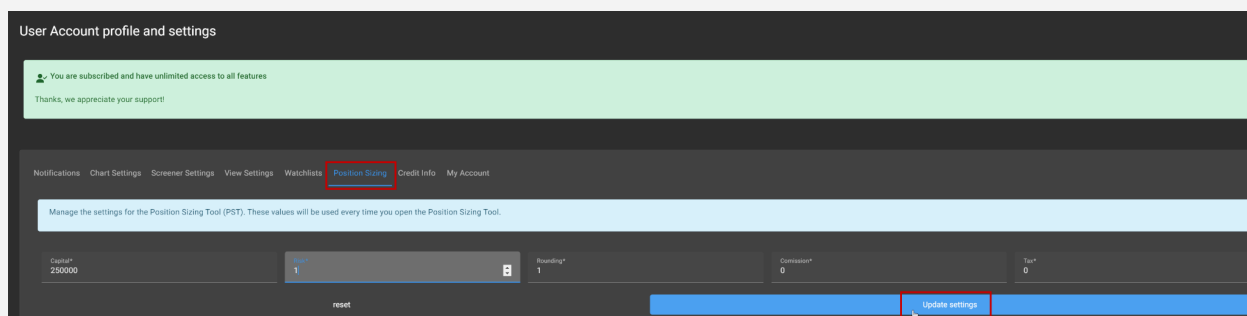
How the position sizing tool is used when setting up a trade in an individual stock [can be read in this article](). In this lesson we show you how to customize the tool to your own preferences.

Capital

Set the amount of your total available trading capital.

Risk%

This is the maximum percentage you wish to risk when opening a new position. Attention, this % is based on your total trading account entered under 'Capital' and not on the size of the individual position.

So 1% means that - when your initial stop loss is triggered in an individual position - the loss may not exceed 1% of your total equity. In the example above, where 'Capital' is set at $25000 this means a maximum loss of $250.

Rounding

When using the tool, ChartMill will show how many shares can/may be purchased based on the set parameters. By default, the number of shares is rounded to '1'. This is where you can change this if desired. It is always rounded down.

The tabs 'Commission' and 'Tax' speak for themselves. Here, you can add the broker fees and any other taxes that apply (depending on the country you live in). After this, confirm the changes with 'Update Settings'.

In the next lesson, we will continue with the 'Trading Ideas' section. These are screens predefined by ChartMill and intended for a specific target group of investors or traders. They can be used immediately to find setups or you can use these trading ideas as a base and further modify or expand them to become fully personalized screens.

The Power of Predefined Trading Ideas

Lesson 1 was about the advantages of a stock screener over manual screening and we showed a first example of a simple combination screen to find pure growth stocks in a bullish trend.

Lesson 2 we continued with the results of that screen. How best to view them and how to set multiple screen and view settings as default via your account page.

In this third lesson we dive back into the screens!

Trading Ideas

Today we are going to dive into the ChartMill Trading Ideas. These are predefined screening filters that you can use ready-made, but you can just as easily use them as a starting screen and add your own touches or modify existing filters. We discuss two fundamental (FA), two technical (TA) and 1 combination screens (FA+TA).

TIP: The Trading Ideas section can be found in the main menu on the right side of the homepage or can be accessed [directly through this link](#).
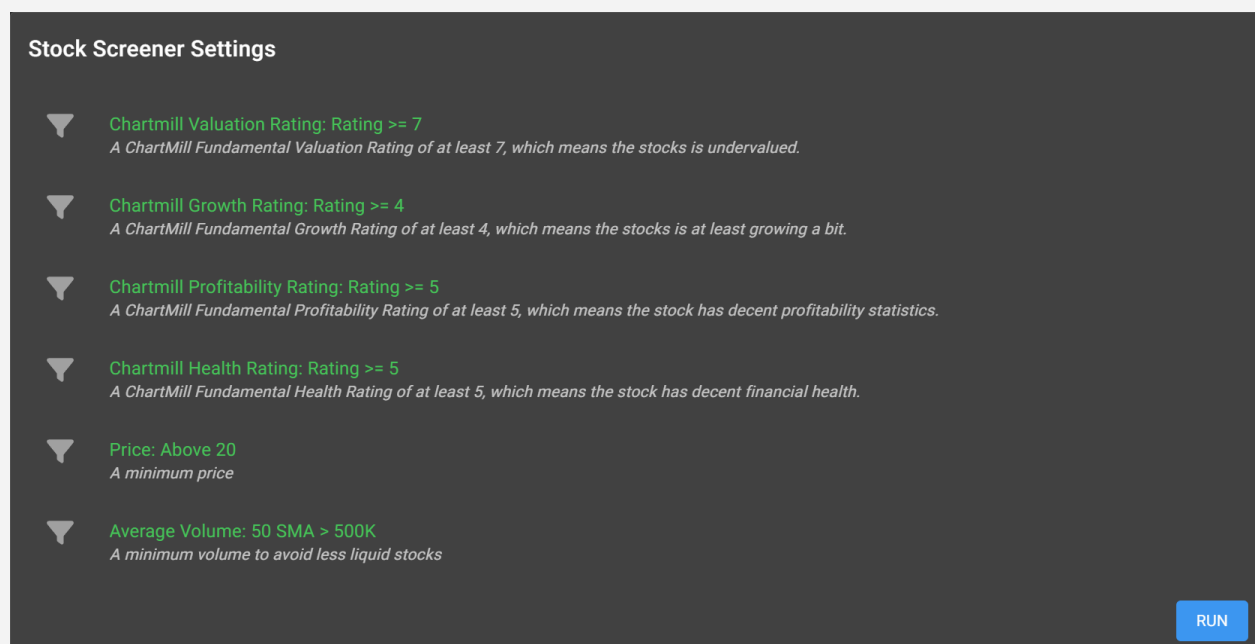
Let's start with the purely fundamental Trading Ideas. These are designed for the long-term investor who selects stocks based on, among other things, company earnings, quarterly and annual results and how the company compares to its main competitors.

In order to be able to valorize these intrinsic characteristics, we will exclusively use fundamental filters based on various ratios that provide insight into the valuation, profitability, growth and financial health of a company.

Valuation Screen: Undervalued Stocks Using ChartMill Ratings (FA)

Are you looking for undervalued stocks but have no idea which screening filters are relevant for this? Then the *'undervalued stocks'* screen, based on ChartMill ratings is a good starting point.

ChartMill gives a score for growth, profitability, valuation, dividend policy, and the company's financial health based on the financial data published by the company. That score ranges from 0 to 10.

Stock Screener Settings

▼ Chartmill Valuation Rating: Rating >= 7
A ChartMill Fundamental Valuation Rating of at least 7, which means the stocks is undervalued.

▼ Chartmill Growth Rating: Rating >= 4
A ChartMill Fundamental Growth Rating of at least 4, which means the stocks is at least growing a bit.

▼ Chartmill Profitability Rating: Rating >= 5
A ChartMill Fundamental Profitability Rating of at least 5, which means the stock has decent profitability statistics.

▼ Chartmill Health Rating: Rating >= 5
A ChartMill Fundamental Health Rating of at least 5, which means the stock has decent financial health.

▼ Price: Above 20
A minimum price

▼ Average Volume: 50 SMA > 500K
*A minimum volume to avoid less liquid stocks*

RUN

The Trading idea 'Undervalued stocks' makes use of those ratings. For example, a minimum score of 7/10 is required for the most important component 'valuation'. But also for profitability and financial health, a minimum score of 5/10 is set.

Growth is less important to the typical value investor, which is why the minimum score is lower, 4/10. Note that these are not exact scores but minimum scores. So you will just as easily find stocks showing a growth score of 6/10 (but never lower than 4/10).

In terms of general filters, we use a minimum price of $20/€20 and a minimum average daily volume of 500,000, measured over the last 50 trading days. This is to ensure sufficient liquidity so that shares can be bought and sold easily.

Tip: For Europe, you will find that the number of candidates is rather limited if the trading volume is set too strict. It is better to set a lower number here (e.g. 100,000).

Would you like to focus even more on valuation or do you find the score for profitability a bit on the low side?
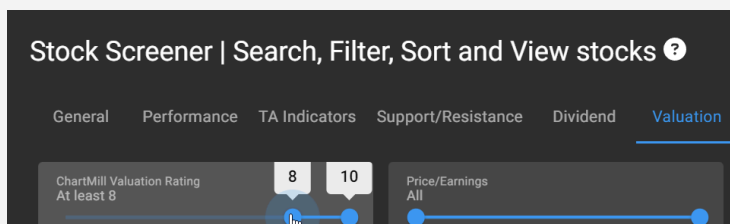
No problem! You can very easily adjust the scores individually for that specific component via the slider. The list of results will immediately adapt to the modified filter.
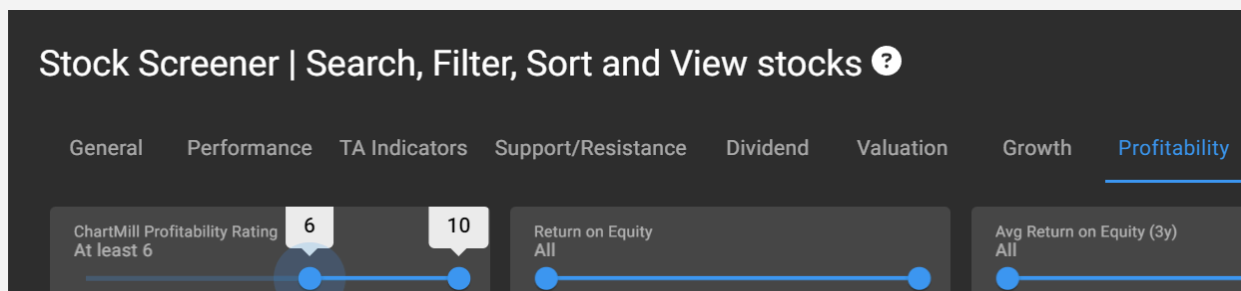
Growth Screen - The Little Book That Makes You Rich By Louis Navellier (FA)

You could also use the ChartMill scores for growth stocks but for the Trading Idea that comes next we used individual fundamental filters based on Louis Navellier's 'Little Book That Makes You Rich'.

In his book he identifies 8 very specific criteria that are used to detect true growth stocks:

- *Positive Earnings Revisions*
- *Positive Earnings Surprises*
- *Increasing sales growth*
- *Expanding Operating Margin*
- *Strong Cash Flow*
- *Earnings growth*
- *Positive Earnings Momentum*
- *High return on Equity*

Stock Screener Settings

EPS 1Y>=15%
Earnings growth

Revenue growth 1Y>=20%
Increasing sales growth

EPS suprise (last 4): EPS(4): Average Surprise Above 10%
Positive Earnings Surprises

Revenue growth Q2Q>=20%
Increasing sales growth

ROE>=10%
High return on Equity

EPS Revision NQ(3m)>4%
The EPS estimate for the next quarter has been increased with at least 4% in the last 3 months

OM growth 1Y>=2%
Expanding Operating Margin

FCF growth 1Y>=15%
Strong Cash Flow

EPS growth Q2Q>=15%
Earnings growth

Exchange: US Only
Only US stocks

(epsQ2Q>pEpsQ2Q)
Positive Earnings Momentum

EPS suprise (last 4): EPS(4): At least 3 beat
Positive Earnings Surprises

We put those criteria together [in this Trading Idea](#) for which we have retained the following screening filters:
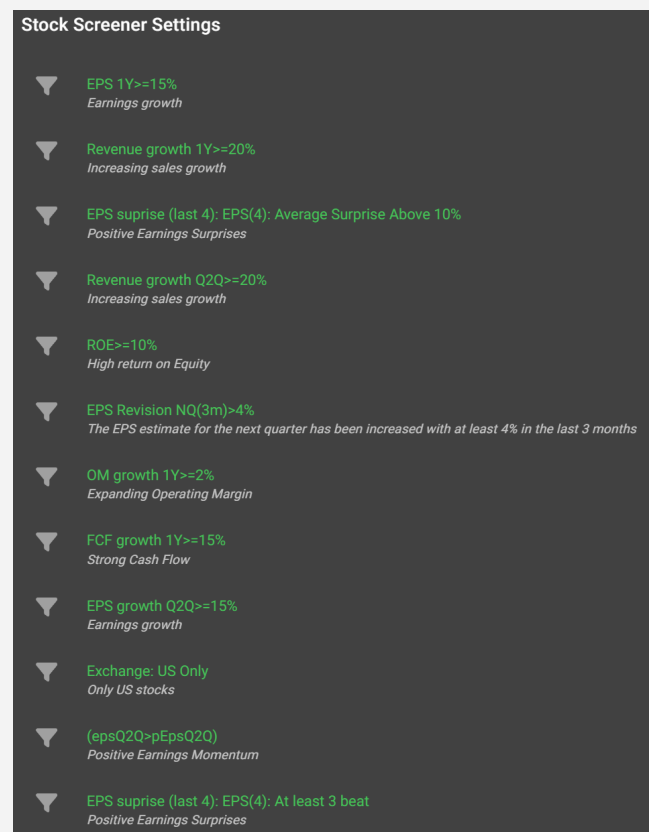
Due to the large number of filters, you will not get masses of results with this Trading Idea.
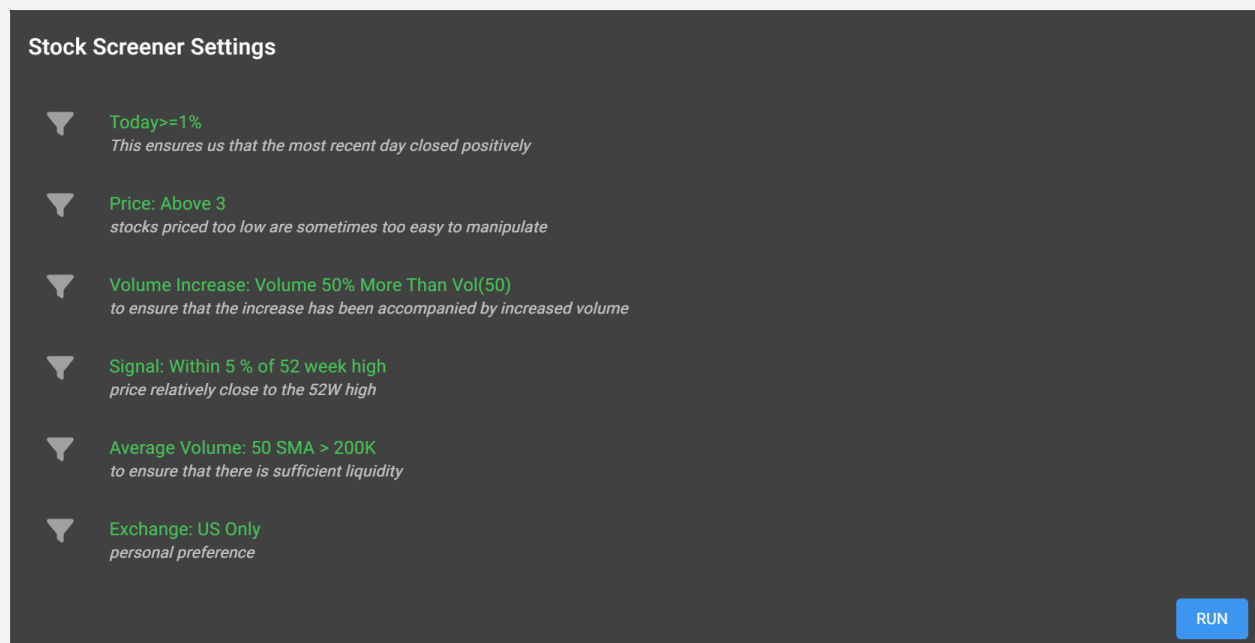
The Surprise and Revision filters are very specific to this screen and ensure that only companies are selected that have outperformed what the market

was expecting and where analysts have also revised their expectations upward. A very powerful screen to find promising growth companies!

The following two screens are 100% based on performance and technical price filters. They are mainly intended for day-swing and position traders who hold stocks for days/weeks/months.

## Breakout Screen - Near 52 week high + increased volume (TA)

This screen looks for stocks whose price is close to the highest 52-week price with increasing volume.

Stock Screener Settings

▼ Today>=1%
This ensures us that the most recent day closed positively

▼ Price: Above 3
stocks priced too low are sometimes too easy to manipulate

▼ Volume Increase: Volume 50% More Than Vol(50)
to ensure that the increase has been accompanied by increased volume

▼ Signal: Within 5 % of 52 week high
price relatively close to the 52W high

▼ Average Volume: 50 SMA > 200K
to ensure that there is sufficient liquidity

▼ Exchange: US Only
personal preference

RUN

This Trading Idea is a really good example to highlight the importance of the general market trend. Breakout trading strategies work very well in bullish market conditions.

In negative market conditions, this screen will barely produce results and any setups will turn into false breakouts in many more cases.

By the way, the strict volume filter ensures that even in bullish markets the number of setups will be limited. Take a look at the example below of Aercaps stock which was one of the results of this screen on the date of 11/30/2023.
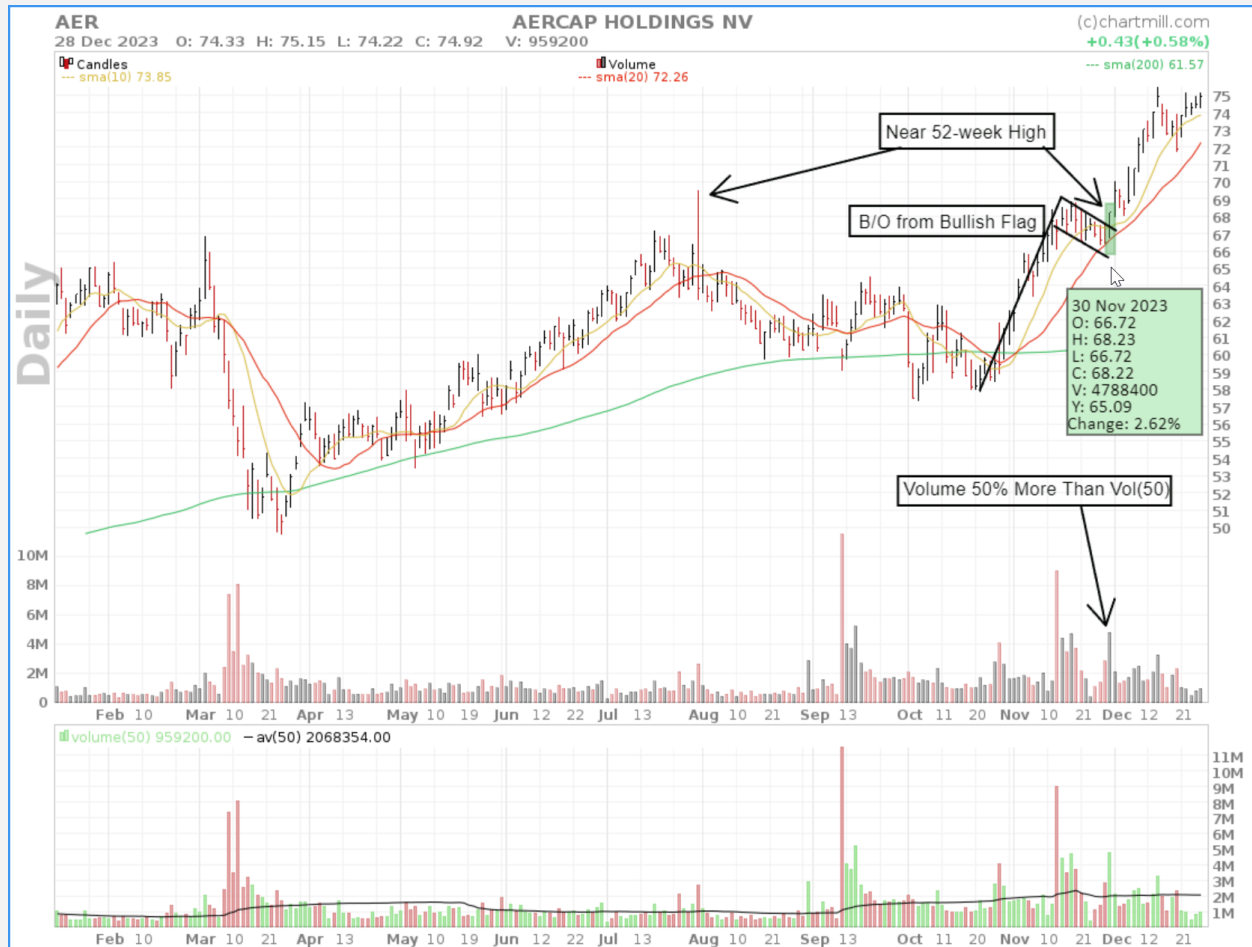
Several elements came together in this setup. On the one hand, there are the selection criteria of this breakout screen that caused the stock to appear on the radar in late November.

Then, when you dissect the price chart a bit further, you can see quite easily the bullish flag pattern and the low volume during the price drop. The price tested the rising SMA(20) followed by a breakout above the flag pattern with strong rising volume. A clear low-risk setup for the active trader.

Breakout Screen - Kristjan Kullamägi Continuation Breakout (TA).

This technical momentum screen is based on the strategy of successful Swedish swing trader Kristjan Kullamägi. He shares his strategy and method completely free via his website (www.qullamaggie.com).
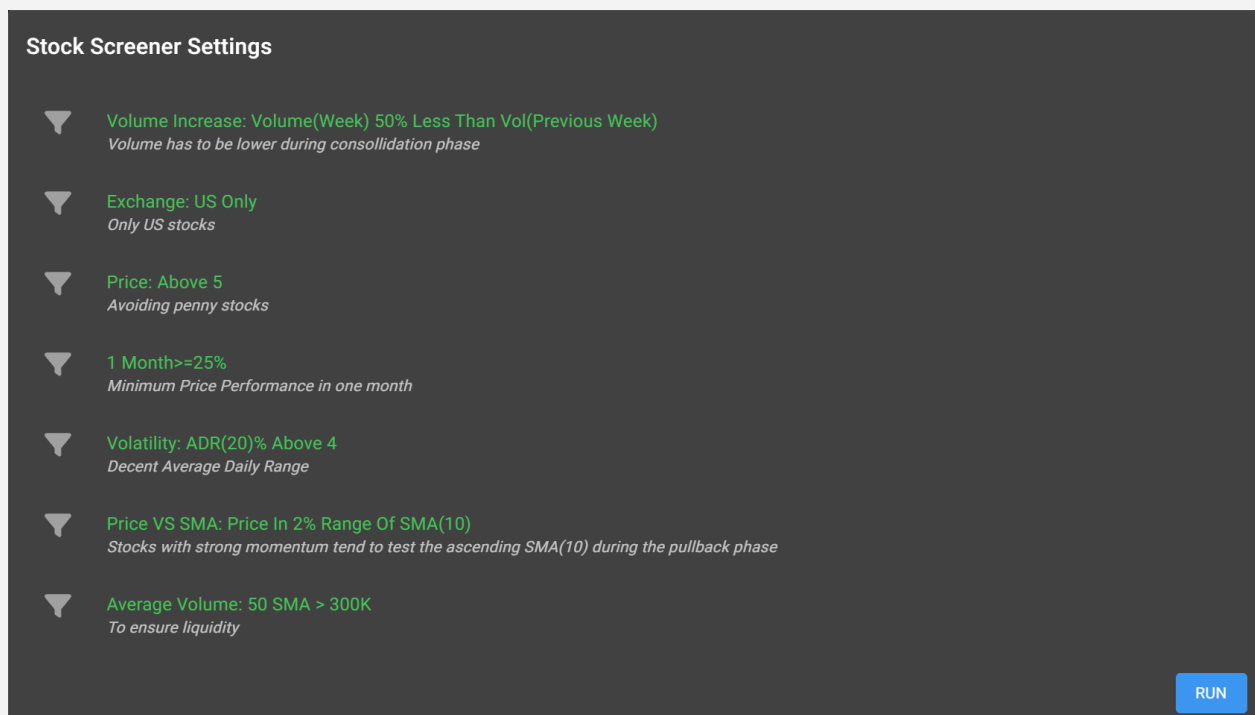
The screen looks for stocks that have risen sharply in the last month, followed by an orderly pullback and consolidation. The average daily range filter ensures that only stocks that show a lot of momentum are selected.

If the stock then breaks out again after the interim break, a long position can be taken, speculating on a continuation of the rising trend.

The example below shows the stock of Macy's as a result of this screen:

Kullamägi uses a period between 1 and 3 months during which the sharp increase (25% to 100%) occurs. You can easily adjust that yourself through the performance menu on the stock screener page.
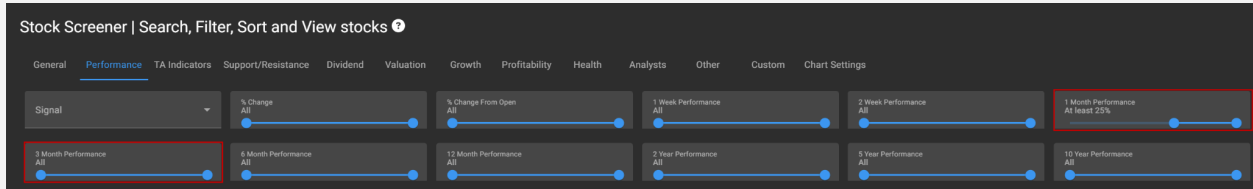
The same goes for the Price vs SMA(10) filter, which you can quickly adjust to 5% which will initially leave you with more candidates.
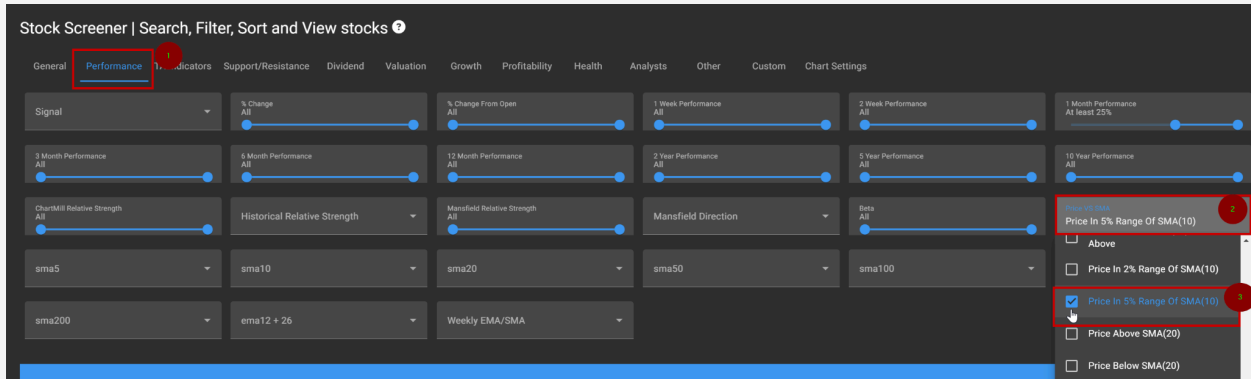
We end this lesson with a combination screen using both fundamental and technical filters.

Breakout + Growth screen - Minervini Trend Template, Earnings/Revenue growth and acceleration.

Mark Minervini is a two-time US Investing Champion (1997 and 2021) and has over 40 years of experience. His strategy is a sophisticated combination of technical and fundamental analysis.

The screen includes a lot of trend filters based on moving averages to ensure that the stocks being held are positive both in the short, medium, and long term. There is also a focus on relative strength and how the price compares to the 52-week high and low.

Furthermore, there are certain requirements in terms of profit and revenue growth, and there is considerable attention to profit and revenue surprises.
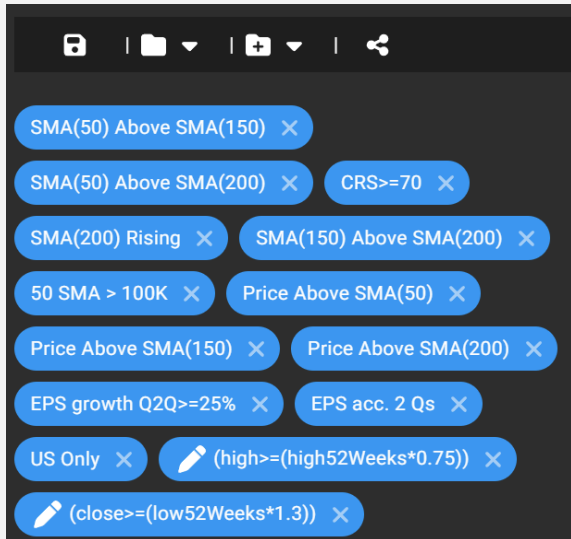
[The screening filters on the left](#) show one of 6 different variants available in ChartMill.

The common feature is the technical Trend Template that forms the basis of each variant.

Each screen has specific profit and revenue features on a quarterly or annual basis or a combination of both.

There are also subdivisions (subscreens) that focus on earnings/revenue surprises and revisions.

These screens make it easy to find stocks with strong growth and revenue numbers and whose stock price is in a clear upward trend.

You can save each Trading Idea as a personal screen so that you do not have to select the Trading Idea every time.

Open the Trading Idea, and its results are displayed on the stock screener page.
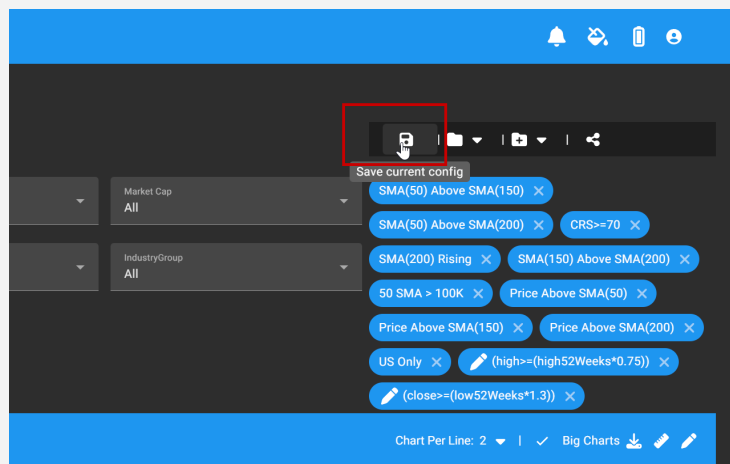
All used filters of the Trading Idea are listed in the upper right corner. Click the floppy disk icon to save the filter configuration as a personal screen. Choose a name and click save.
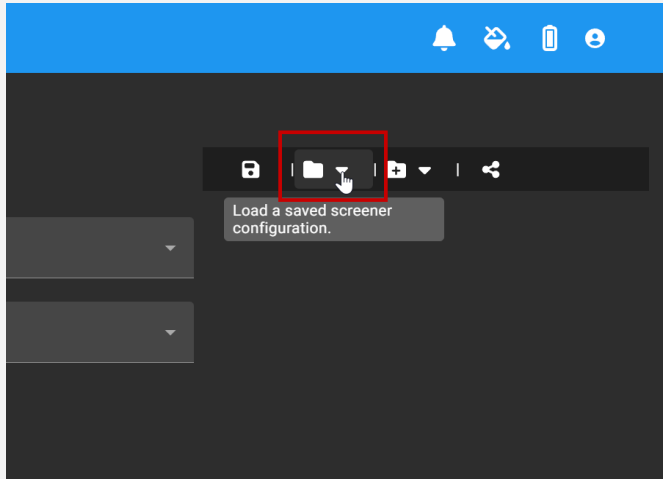
From now on, you can load this Trading Idea directly from your personal screens on the stock screener page.

Now what?

The trading ideas we just discussed are just a small sample of a large selection available on ChartMill.

Check them out, use them, and, above all, don't forget to experiment with the different filters. That is the best and fastest way to learn how to work with all the features the screener offers. Remember, the more you use it the better you will be at refining the list to what you are actually looking for.

The next lesson will be an important one. In it, I will explain in detail how to start building a fully personalized screen without using existing trading ideas. What to look out for, how to start exactly and the things to avoid, will all be covered.

Building a Screen from Scratch

In the previous lesson, we discussed the various trading ideas that are built into ChartMill. But what is the best way to go when you want to build your own screen completely from scratch? That is exactly what we are going to focus on in this mail.

After today's lesson, you will be able to turn your idea into concrete screens, including different variants.

Ready? Here we go!

Starting From Scratch

Building your own screen is a process that grows and takes time. After all, the goal is for the final screen to give you nice setups for the strategy you want to use over and over again.

Describe your strategy in just a few lines.

Start by writing out your strategy but keep it simple, the details will come later, when we define the specific filters.

An example:

"Find strong US stocks which have recently risen significantly and where the long and medium term is bullish. In the short term, however, there is a slight downturn in prices."

The purpose of this screen is to select strong-performing stocks (high relative strength) that have recently declined somewhat in price and therefore offer opportunities to buy them.

Start with the basic screen

Let's start with some general filters that form the backbone of your screen, you'll find them under 'General' on the stock screener page:

- U.S. stocks only
- Minimum price $10
- Minimum volume 300,000
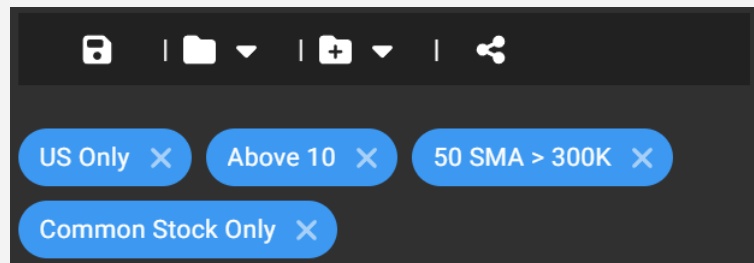
Searching for stocks that are in a bullish trend can be done in several ways. In this example, I am going to use the 200-day and 50-day averages to visualize that trend.
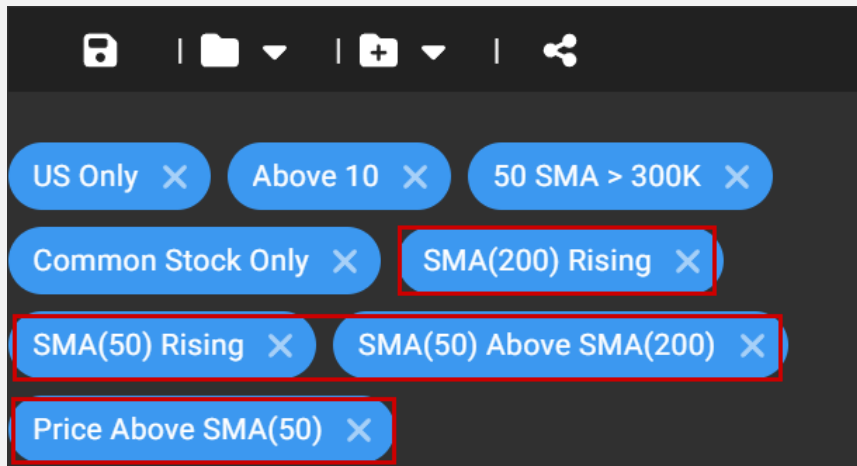
Setting filters based on averages is done via Stock Screener Page > Performance

Using the above filters, I just configured that both the 50- and 200-day moving averages should rise and that the 50-day average should be higher than the 200-day average. Finally, the current price was set to be higher than the 50-day average.

A Relative Strength Performance filter was also added with a lower limit of 70

(Stock Screener page > Performance > ChartMill Relative Strength).
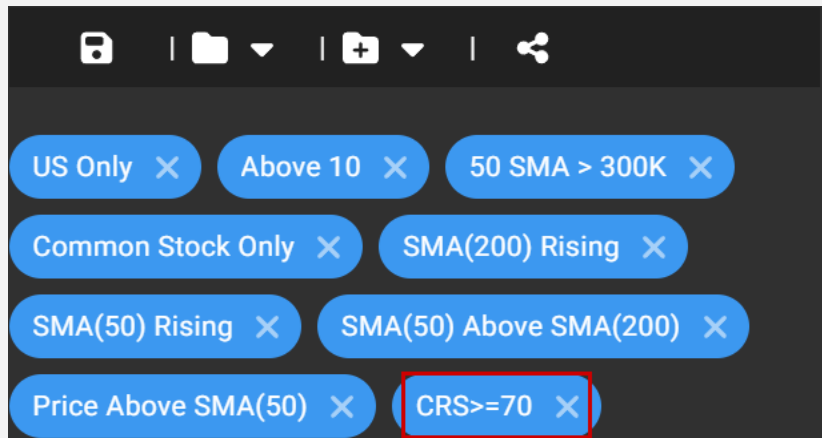
This RS filter compares the performance of the stock with all other US stocks. A number higher than 70 means that the stock screener may only retain stocks that outperform 70% of all US stocks in our database.
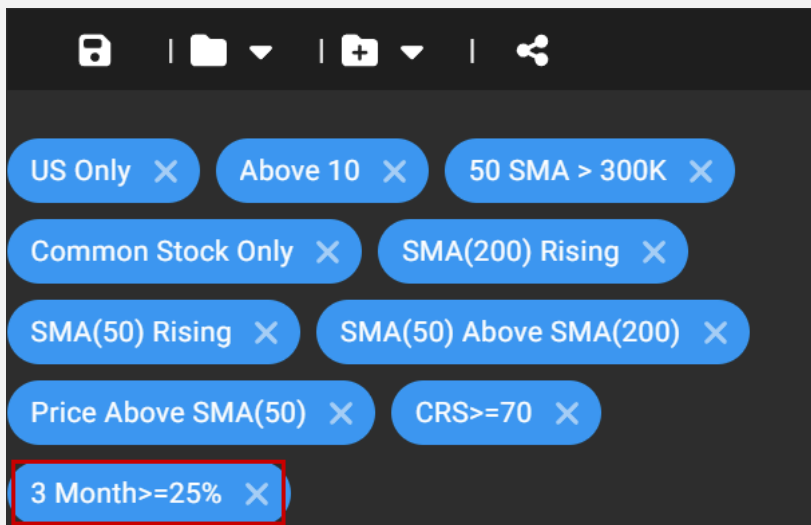
Next, we add a specific performance parameter. For this example, a price increase of at least 25% over the past three months was determined.

(Stock Screener page > Performance > 3 Month Performance).

Finally, we need to add another filter that describes the slight price decline.

We do so by defining a price drop of no more than 10% over a period of the last 2 weeks.

(Stock Screener page > Performance > 2 Week Performance).
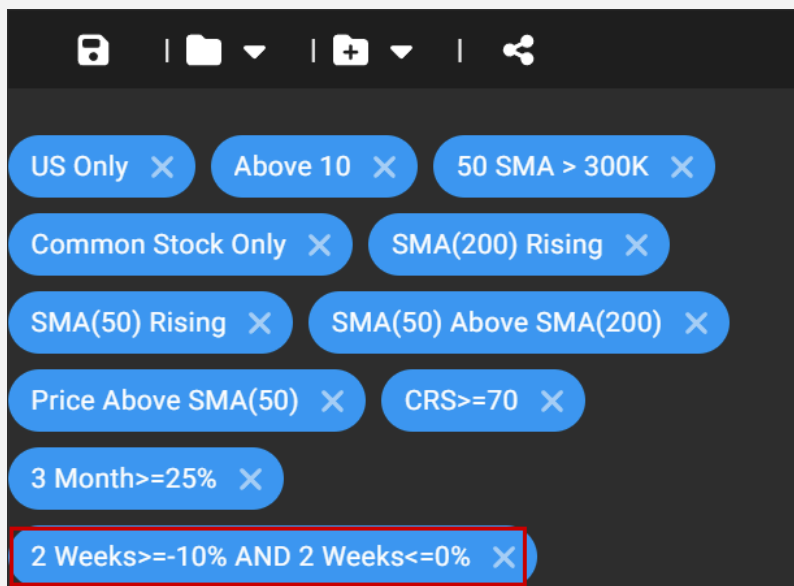
Which exact settings you use for the timeframe and the percentage increase depends on your personal preference but there's one important tip; don't set the filters too strict. If you notice that you are left with a lot of results, you can always adjust them afterward.

This is the link to the basic screen.

Keep in mind that the number of results on this screen can vary greatly, depending on market conditions. In a negative market environment, it is normal that you will get far fewer results. But as we mentioned in the first email, this is an advantage of using a good screener, because the number of results for a specific screen gives you insight into the market conditions.

From this point, you can now experiment further with adding additional filters.

For example, let's try narrowing down that price drop a bit. On the next page, I show four different ways to do that.

Extension base screen option 1 - price maximum 1% above the rising 10 (SMA).
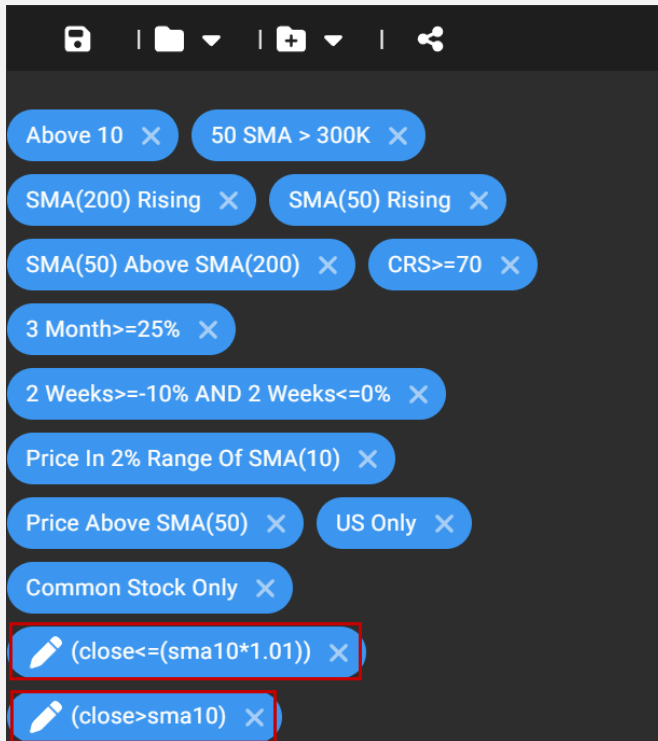
To configure this, we used a custom screen (the use of custom screens will be discussed later in this course).

With this filter, you only get to see the stocks that are a maximum 1% higher than the rising SMA(10), while all other basic filters remain valid.

[Direct link](#)

An example: Builders Firstsource Inc (12/29/2023)

Extension base screen option 2 - price maximum 2% above the rising 20 (SMA)

This is a similar variant but by using the SMA(20) instead of the SMA(10), only stocks that are at most 2% away from the rising SMA(20) are retained.

These are stocks where the price has fallen slightly more than in the first example.

[Direct link](#)
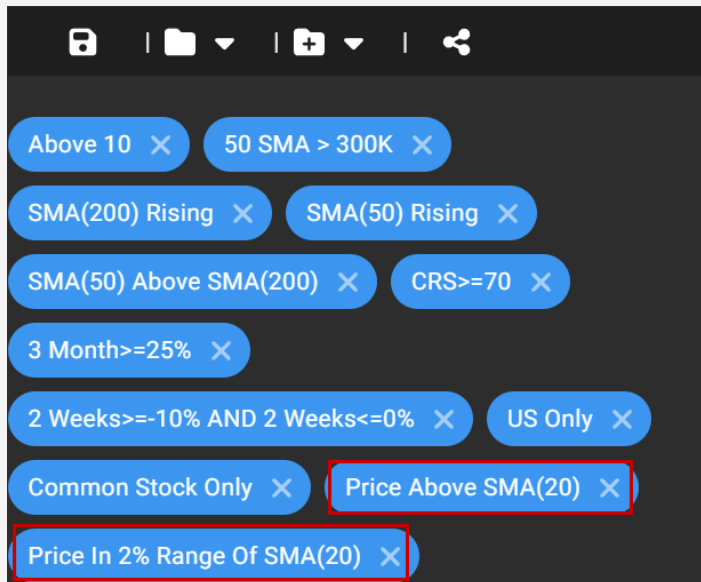
An example: Steven Madden LTD (12/29/2023)

As a matter of fact, to find such slight price declines, one does not solely rely on the use of moving averages. You can also use technical indicators. Two examples, again starting from the basic screen:

Extension base screen option 3 - price maximum 2% from the lower Bollinger Bands.
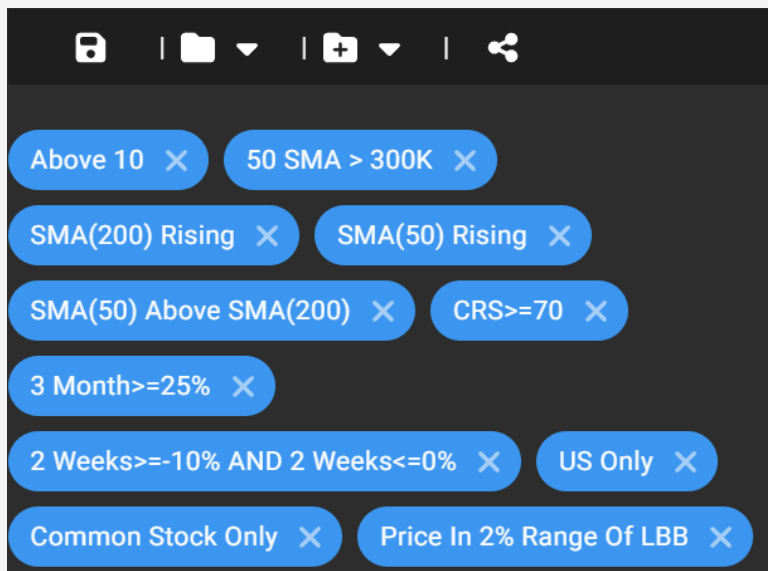
This screen retains only stocks that are no more than 2% off the lower Bollinger Band.

This way, you get more or less similar results as with the 10 and 20 moving averages.

Direct link

An example: Palo Alto Networks Inc. (12/29/2023)
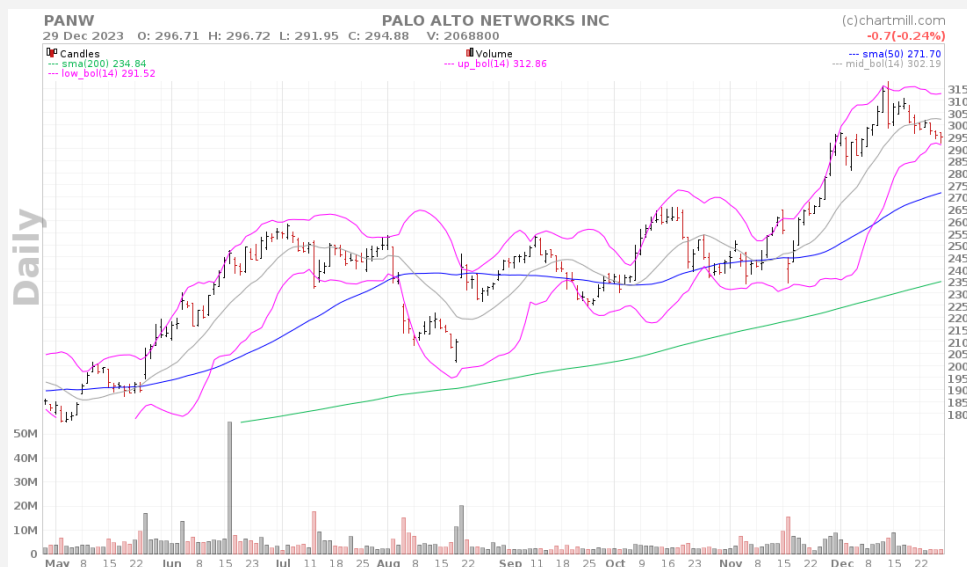
Extension base screen option 4 - RSI (14) < 50

The RSI is a technical indicator that reflects overbought & oversold conditions.

The default values used for this are 70 and 30 (or 80/20, the slightly stricter version).

[Direct link](#)
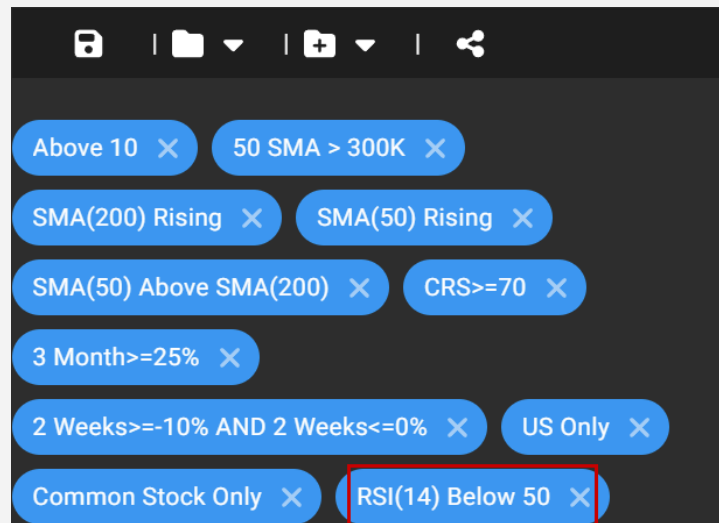
In this example, I have defined that the RSI just recovered from a value below 40.

An example: BJ's Restaurants Inc. (01/18/2024)

As you can see, for each of the 4 variations we started from the basic screen because this is the most efficient way to make good screens around the same basic idea. The variations will sometimes be just small nuances but it allows you to look as broadly as possible.

This makes screening a lot clearer, and it will also ensure that you can quickly focus on the screens that give the best results at that moment.

Please note that in the example above, only price filters were used. You could also add fundamental filters that set conditions for a company's growth or profitability.

A great example of a basic technical screen extended with multiple fundamental filter variants are the various Minervini screens in ChartMill about which you can read more here.

In Summary

- When developing personal screens it is best to start from a simple basic idea that you define with several basic filters and from which your basic screen emerges.

- Extensions and variants are always started from your basic screen and saved as separate screens. It will make the screening process much clearer and more efficient.

- Do not make the mistake of trying to use too many filters in one and the same screen. That way you will make the selection so strict that you will hardly have any results left.

- The extent to which screens produce good setups is highly dependent on market conditions. With multiple variants of one basic screen, you will be able to respond better to these rapidly changing conditions.

What's Next?

In the next lesson, we will continue to organize the results from a screen by using watchlists.

Grouping Stocks Into Watchlists, Analyzing The Results

Welcome to lesson 5 of this ChartMill Manual!

In today's lesson, we will continue with the results your screen has produced. After all, that basic selection needs further analysis to come up with a final selection of setups that are trade-worthy.

Two things that are important in this process:

- *Grouping stocks into your own watchlists*
- *Reviewing, analyzing, and comparing the results to one another*

Using Watchlists

In Chartmill, you can create watchlists that will make in easy to follow interesting setups or open positions.

It is best to use several separate watchlists that are part of the same strategy. I use three different watchlists:

A general watchlist

This contains the tickers from your screens that are worth keeping an eye on and where there is a good chance a setup will be formed.

A setup list

You use this list to keep track of stocks for which you have open orders that have not yet been triggered.

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An Open list

The final list I use to track all open positions. This way, after the market closes I have an overview of the positions with one click and I can do my EOD analysis from here.

Creating a watchlist

Watchlists are an important part of your daily workflow and they make screening and analysis a lot more comfortable.

Click the + sign to add a stock to an existing or newly created watchlist.
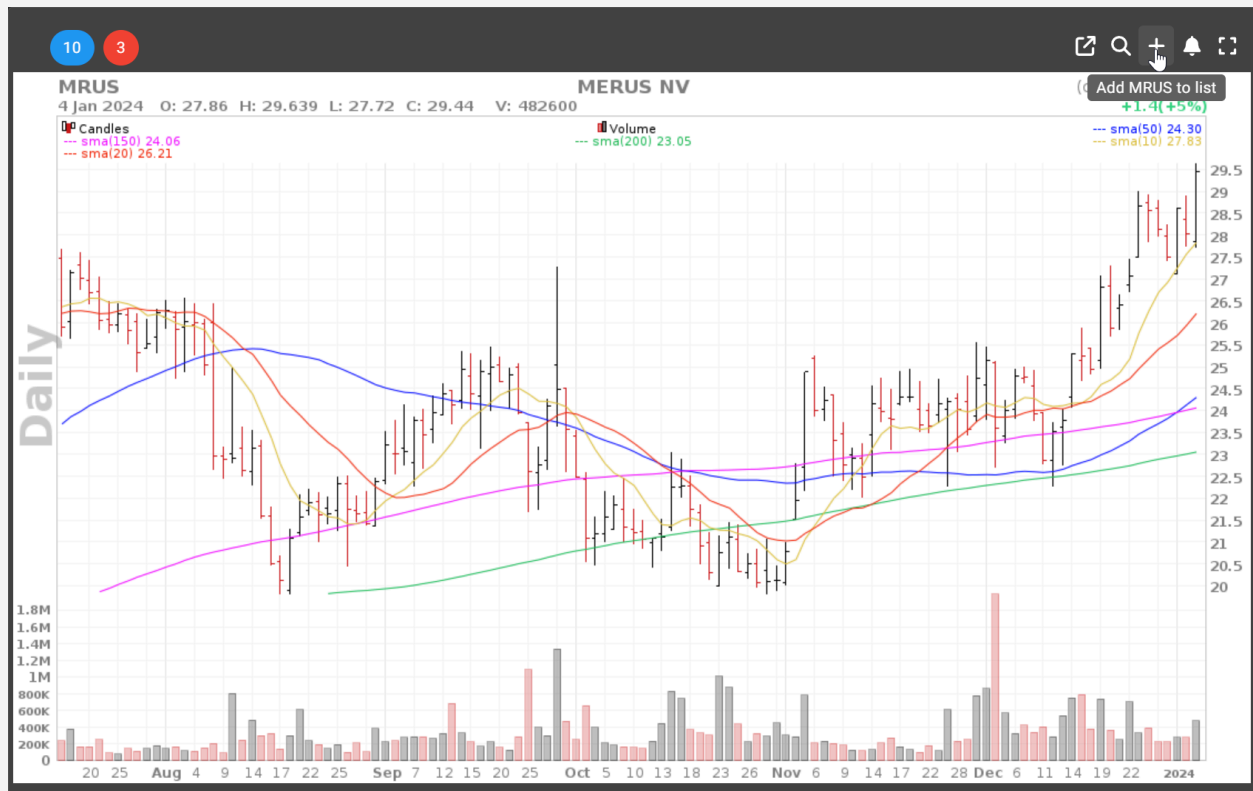
You can also add the results of a screen to a specific watchlist all at once. To do this, click the + sign in the blue horizontal bar, on the far right, of the screener page.
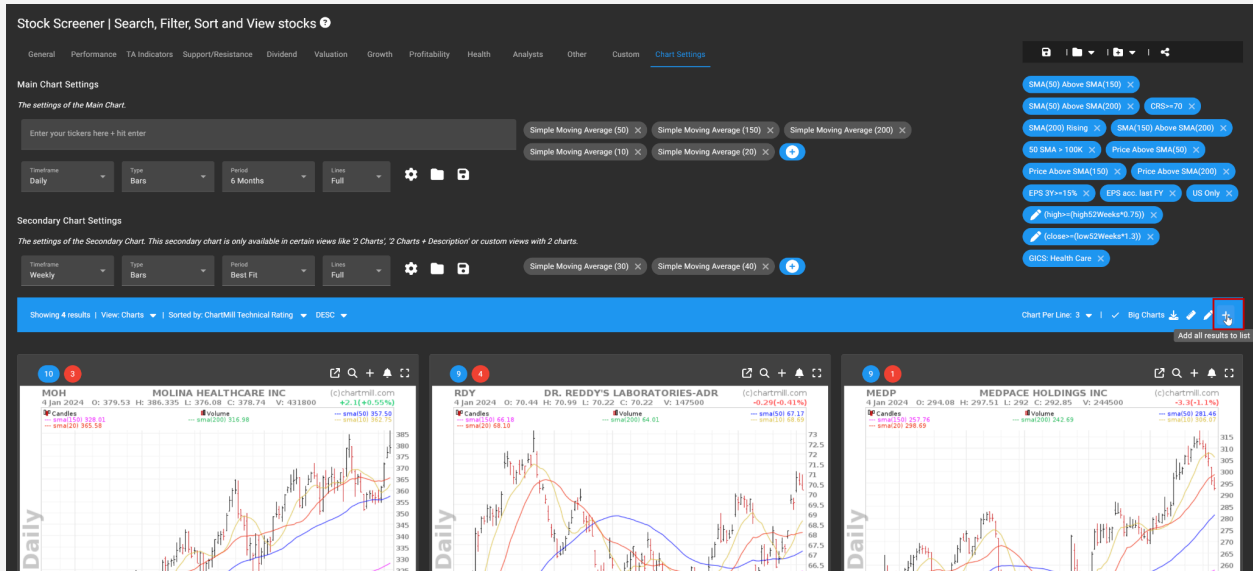
This is especially useful if at a later date, you wish to apply other screening filters to this particular watchlist (more on that later).

You can open your watchlists from any page, by clicking 'open watchlist' in the top horizontal bar.
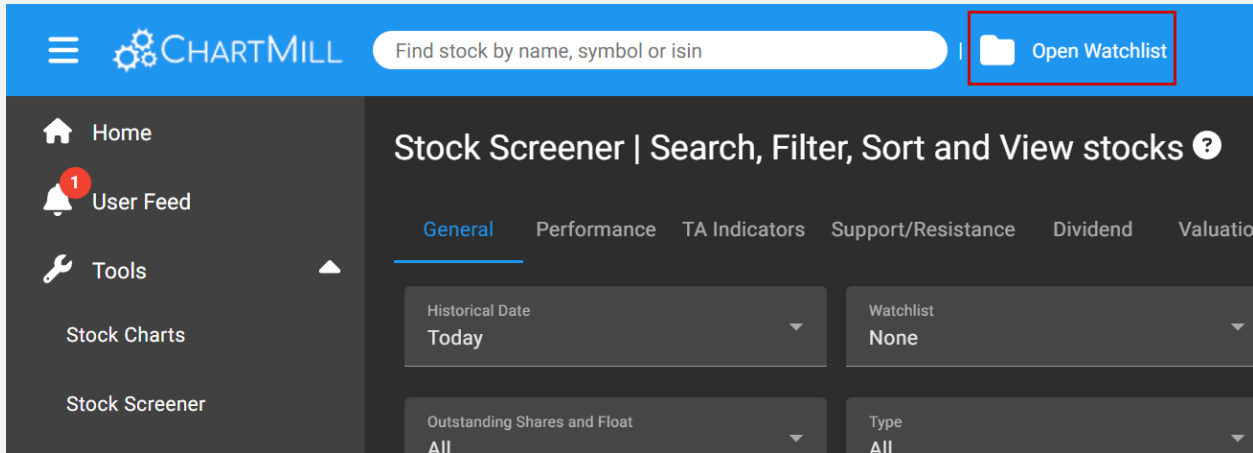
Apply screens to an entire watchlists

A very useful feature in ChartMill is that you can apply all the built-in trading ideas and your own created screens to a selection of stocks in a specific watchlist.

For example, suppose you have a list of growth stocks you want to invest in. However, you are only interested in the growth stocks that are trending upward in both the short and long timeframe.

A very good filter for identifying stocks in a general upward trend is Mark Minervini's Trend Template screen. The screen combines multiple moving averages while setting specific conditions on the price level relative to the 52-week high and low.

You can apply this template screen to that list of growth stocks. To do so, proceed as follows.

Go to the 'Trading Ideas' page and open the 'Minervini Trend Template'. The results will be visible on the Stock Screener page.

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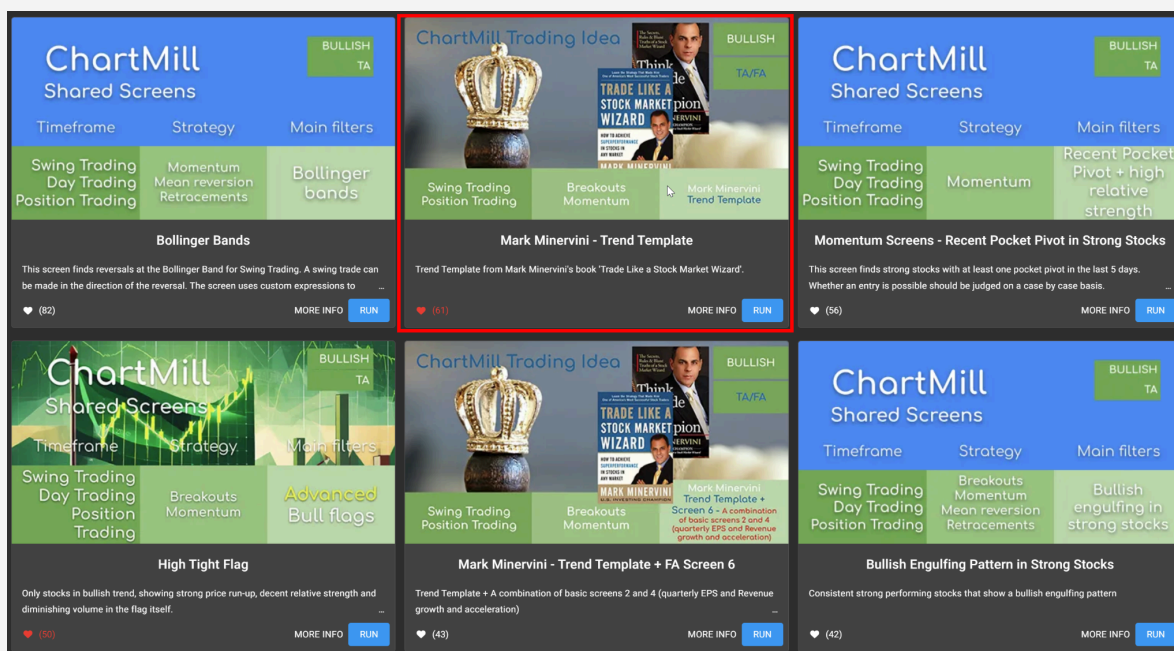
Once the trading idea is active, select the General tab and open the dropdown menu under Watchlists. Select the watchlist that contains the stocks you want the Trend Template screen to match.
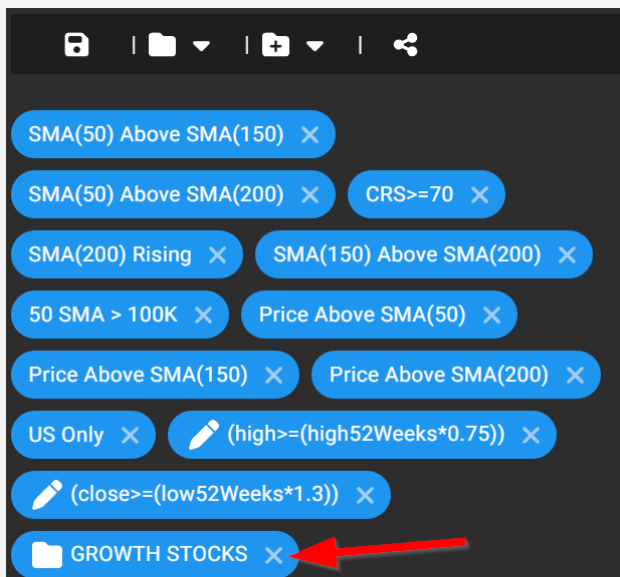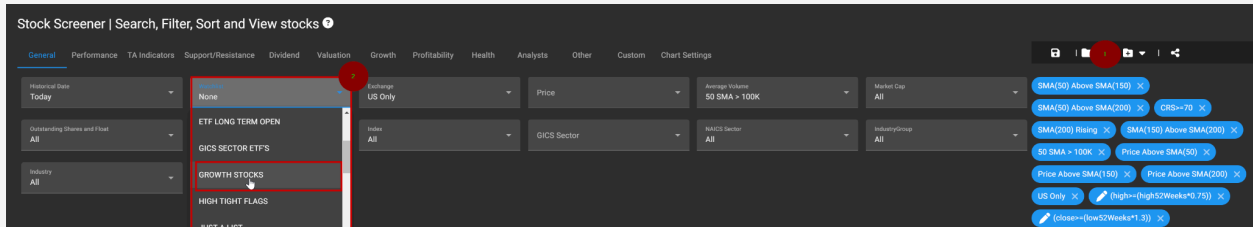
This adds the watchlist as an additional filter.

ChartMill will now only show stocks from that watchlist that meet all the conditions of the Trend Template screen.

Setting alerts on watchlists

Alarms can be set per ticker but ChartMill also allows you to set alarms on an entire watchlist.

This is how you do it:

Open the watchlist on which you wish to set an alarm. Once the watchlist is open, click on the bell icon in the blue horizontal bar on the far right.
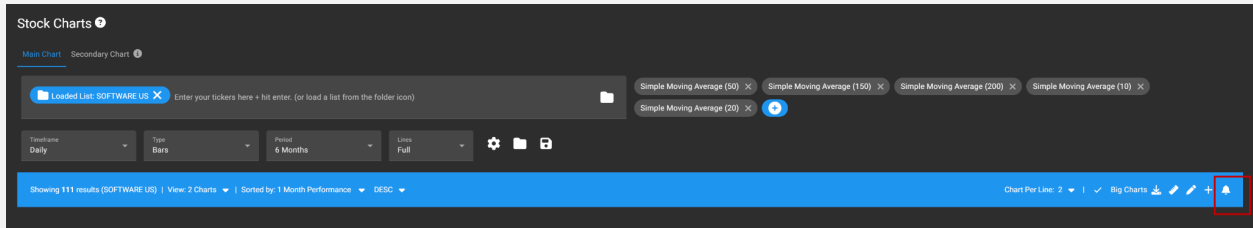
You can choose from a wide range of options.

Learn more about these different types of alarms [in this video.](#)
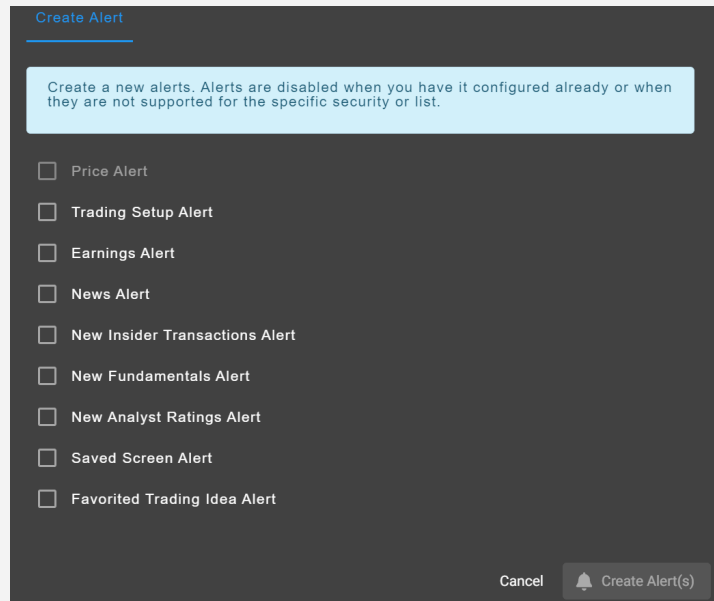
Viewing results in ChartMill

The most common method of viewing the results of Trading Ideas or own screens is the chart view.

However, there are numerous other options in ChartMill.

On the stocks screener or stock charts page, click the inverted triangle next to "view" on the left side of the horizontal bar and a dropdown menu will open with multiple options.
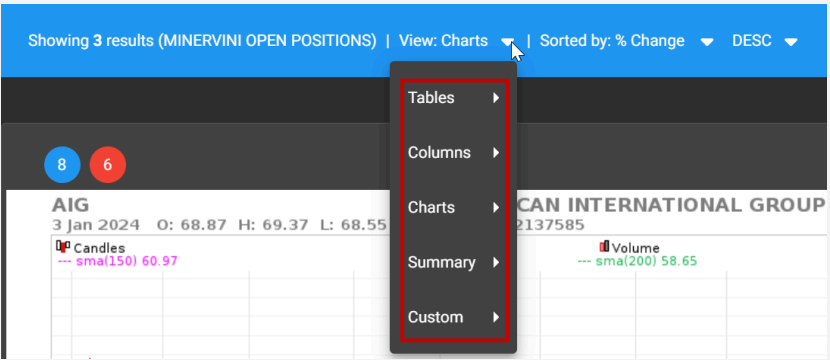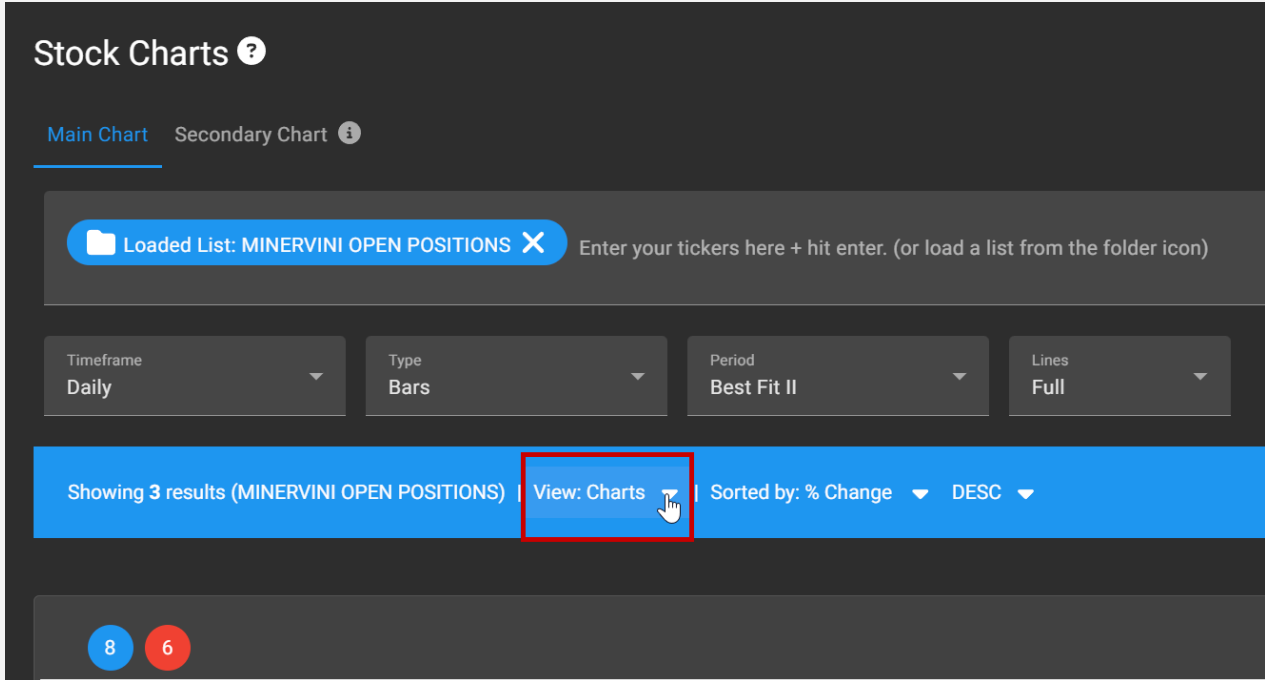
You can choose from multiple views:

Let's take a look at some sample views:

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Charts > 2 charts

In addition to the classic 'Charts' view, you also have the option to choose '2 Charts'.

This ensures that you will see two charts of the same ticker next to each other.
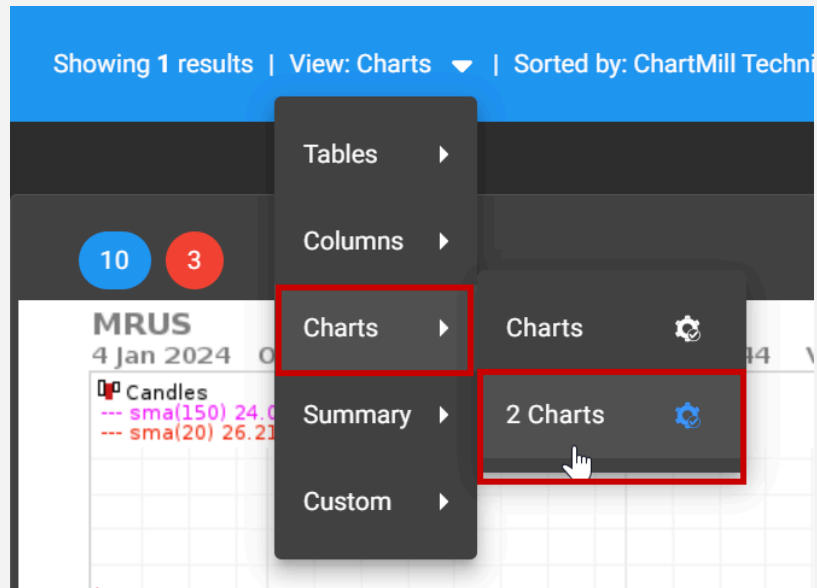
The Result:
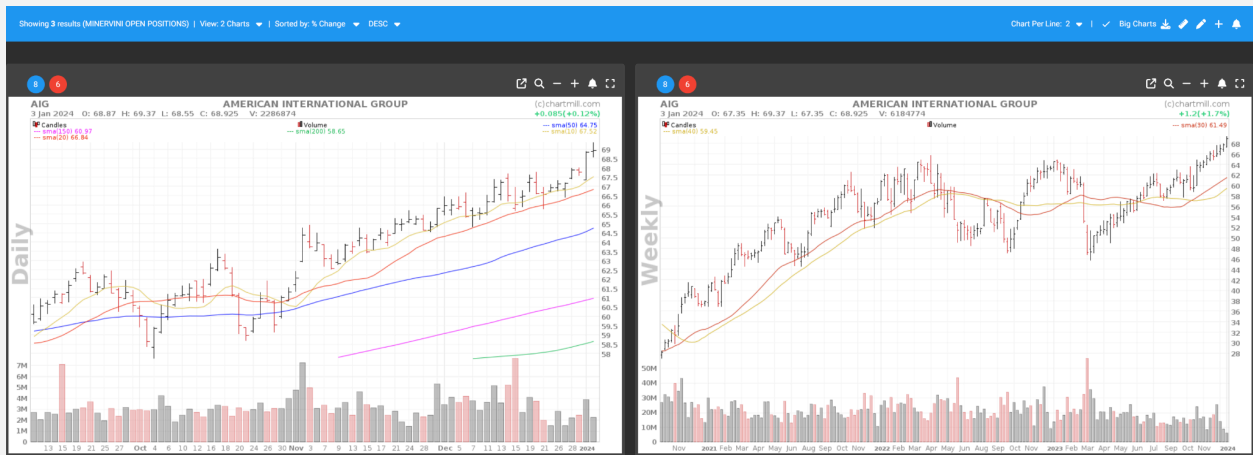
This allows showing two different timeframes of one stock. In the example above, you see the daily chart on the left and the weekly chart of American International Group (AIG) stock on the right, but other (intraday) timeframes are also possible.

Each chart can also be customized individually with its own indicators and overlays. This view is particularly useful for swing traders, among others.

Column > Growth
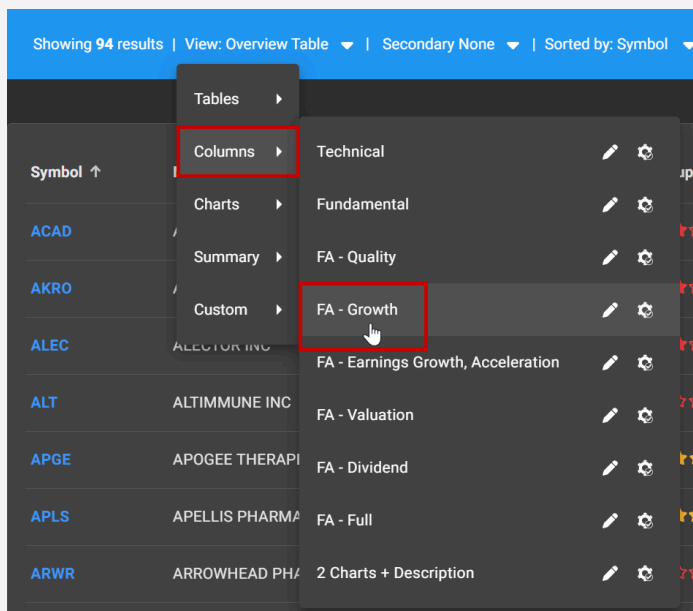
The column view "FA-Growth" is more focused on fundamental ratios with a focus on growth parameters.

The result:
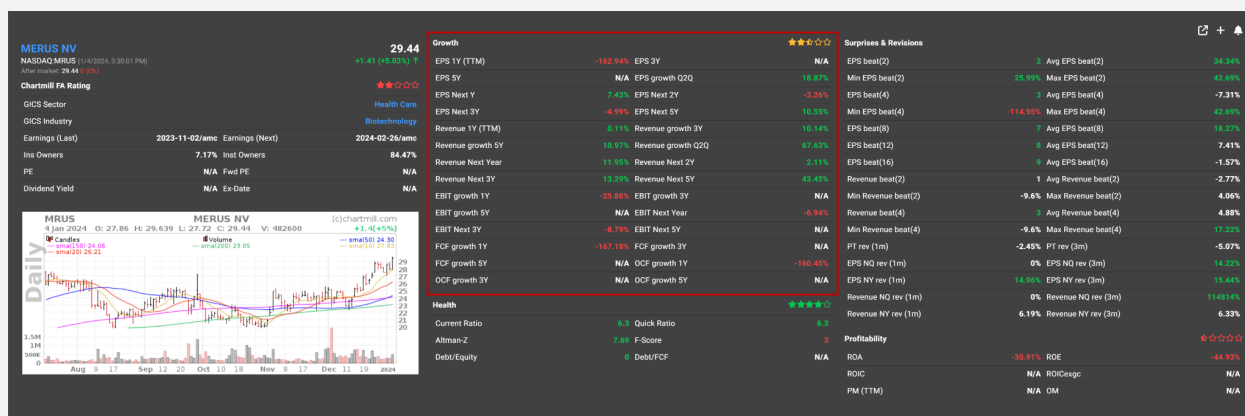
The "FA-Dividend" view provides information on the dividend yield, growth, and payout ratio, with a few handy fundamental charts that allow you to see at a glance the evolution of the dividend.

Be sure to check out the specific views for value and quality investors.

Summary > TA & FA Reports

The comprehensive TA and FA reports found on each stock's profile page can also be set as a view via Summary > TA or FA Report.

On the next page you will find a technical and fundamental report for Microsoft.

MICROSOFT CORP (MSFT).

Technical Rating and Analysis

8

Taking everything into account, **MSFT** scores **8** out of 10 in our technical rating. This is due to a consistent overall performance, although we see some doubts in the very recent evolution. In the medium time frame things are still looking good.

✓ The long term trend is positive and the short term trend is neutral. The long term trend gets the benefit of the doubt for now.

✓ When comparing the yearly performance of all stocks, we notice that **MSFT** is one of the better performing stocks in the market, outperforming 91% of all stocks. We also observe that the gains produced by **MSFT** over the past year are nicely spread over this period.

✓ **MSFT** is one of the better performing stocks in the **Software** industry, it outperforms 72% of 280 stocks in the same industry.

✓ **MSFT** is currently trading near its 52 week high, which is a good sign. The S&P500 Index however is also trading near new highs, which makes the performance in line with the market.

✓ **MSFT** has an average volume of **27049500** traded shares per day. This is a good sign as it is always nice to have a liquid stock.

ℹ In the last month **MSFT** has a been trading in a tight range between **364.13** and **377.64**.

More info and screens

[Technical Analysis] [Relative Strength] [ChartMill Trend Indicator]
[Simple Moving Average] [Show peers with best TA rating]

Weekly and Daily overview Charts

Setup Rating and Analysis

8

MSFT has an excellent technical rating and also presents a decent setup pattern. Prices have been consolidating lately. A pullback is taking place, which may present a nice opportunity for an entry. There is a support zone below the current price at **366.01**, a Stop Loss order could be placed below this zone.

More info and screens

[ChartMill Technical Ratings] [Pocket Pivots] [Bull Flags]
[Show peers with best setup rating]

Support and Resistance Analysis

310.71   386.54

We found 4 important support areas.

• A support zone ranging from 362.01 to 366.01. This zone is formed by a combination of multiple trend lines and important moving averages in multiple time frames.
• Support @349.21 from a trend line in the weekly time frame.
• Support @336.04 from a trend line in the daily time frame.
• A support zone ranging from 313.85 to 315.74. This zone is formed by a combination of multiple trend lines in multiple time frames.

We found 1 important resistance area.

• A resistance zone ranging from 372.24 to 382.71. This zone is formed by a combination of multiple trend lines and important moving averages in multiple time frames.

More info

[What is Support and Resistance] [Support and Resistance indicators]
[Support and Resistance Screener and Trading Strategies]

MICROSOFT CORP (MSFT).

Fundamental Rating

7

MSFT gets a fundamental rating of **7** out of 10. The analysis compared the fundamentals against 280 industry peers in the **Software** industry. **MSFT** scores excellent points on both the profitability and health parts. This is a solid base for a good stock. **MSFT** has a decent growth rate and is not valued too expensively. **MSFT** also has an excellent dividend rating. These ratings would make **MSFT** suitable for dividend and quality investing!

1. Profitability

8

1.1 Basic Checks

✓ **MSFT** had positive earnings in the past year.

✓ In the past year **MSFT** had a positive cash flow from operations.

✓ **MSFT** had positive earnings in each of the past 5 years.

✓ **MSFT** had a positive operating cash flow in each of the past 5 years.

Yearly Net Income VS EBIT VS OCF VS FCF

Net Income — Ebit — Operating CashFlow — Free CashFlow

1.2 Ratios

Table > Quality Table

Tables are best suited for comparing and ranking results from a screen.

The "Quality Table view," for example, can be used perfectly with the results of the ["Terry Smith Trading Idea, Quality at a fair price"](#) a screen that looks for typical quality stocks.

In the example above, the results of that screen (US stocks only) were sorted by 'Return on Invested Capital over the past three years (ROIC 3Y)' in descending rank order.

There are lots of other view options to explore. Start using them yourself and you will soon find out which views best fit your strategy.

Despite the extensive number of view possibilities, there will undoubtedly be things that you would have liked to do slightly differently.

That too is possible because you can perfectly create your own views via the 'Custom' option. More on that in the next lesson.
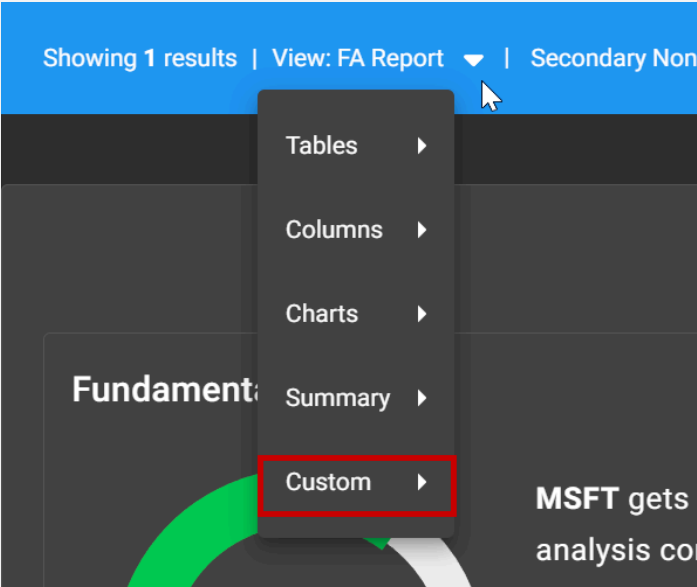
Now it's up to you!

It takes some time to find your ideal combination and by trying out different options you will quickly find out what works best for you.

Designing a Custom View

In the previous lesson, we ended with an overview of the various predefined options for viewing and analyzing the results of your screens.

However, what makes ChartMill so unique are the many options to completely customize the various tools to your liking.

In today's lesson, as an example, I create the custom 3-column view shown below to view the various Minervini screen results.

Tip: open ChartMill and follow the step-by-step instructions from this email to create the exact same configuration. It will help you quickly configure your own views later.
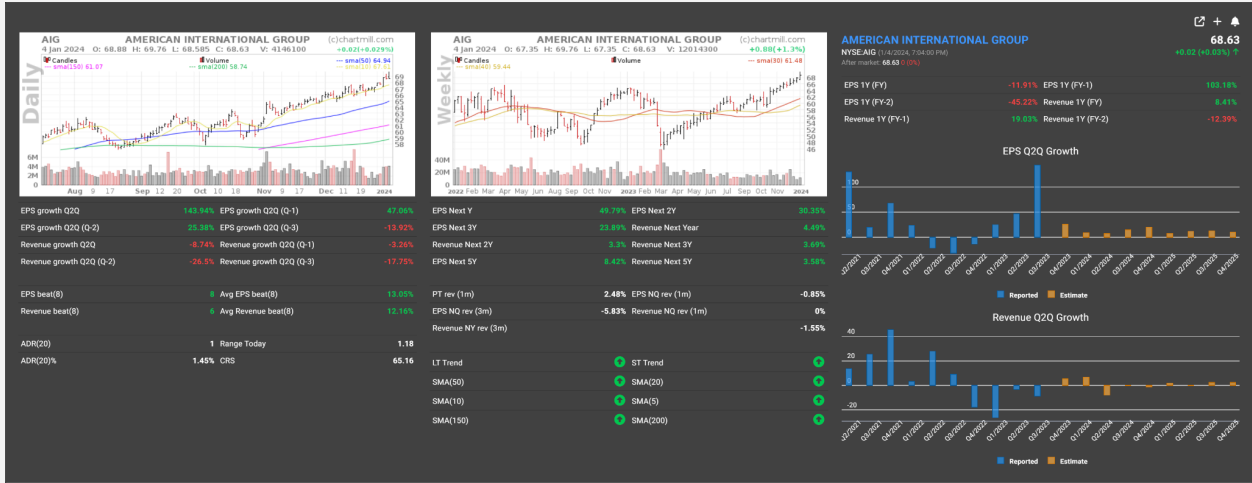
The view includes two price charts along with information on earnings and revenue growth. The two bar charts on the right show the same but make it easier to visualize the evolution of growth.

There is also info displayed further below the price charts on volatility and relative strength and finally in the bottom center some additional info on the long and short-term trends using various moving averages.

Creating this view
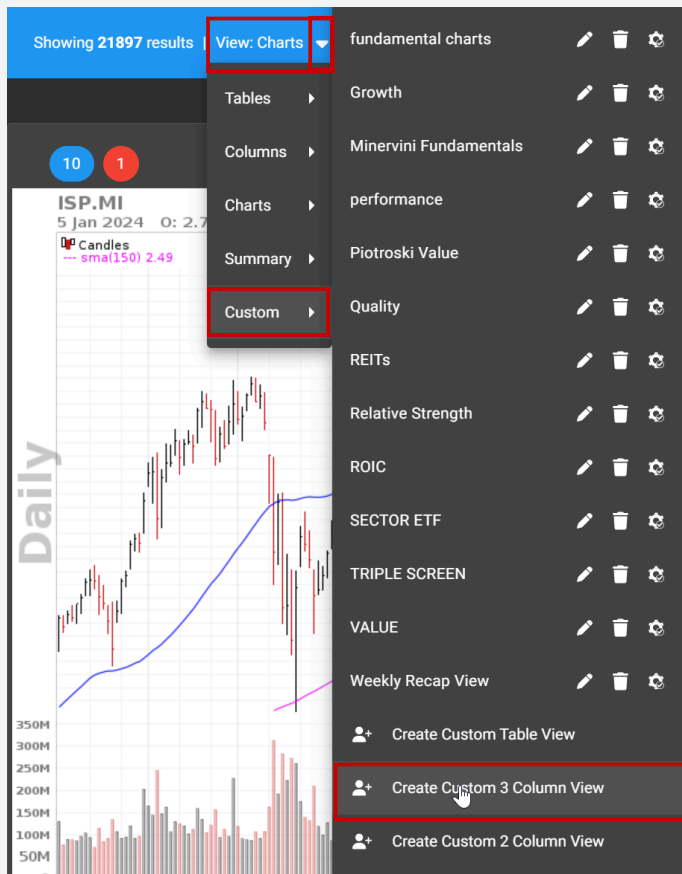
This is a fairly comprehensive step-by-step guide.

We begin by first choosing the "Create Custom 3 Column View" option.

Hereafter you will see the following screen, click on the blue box to the left.

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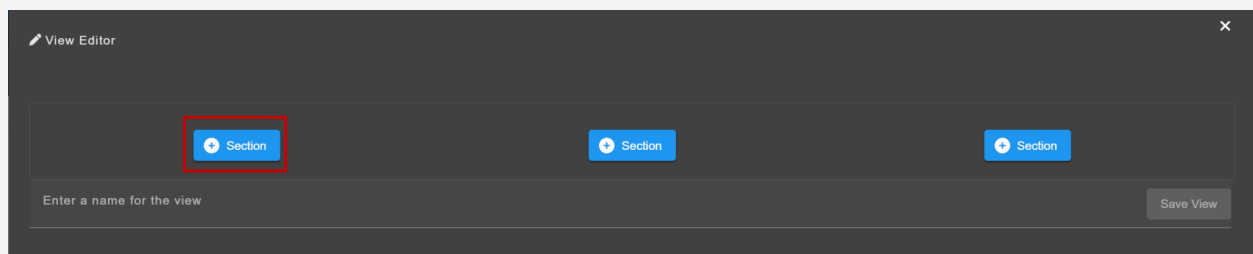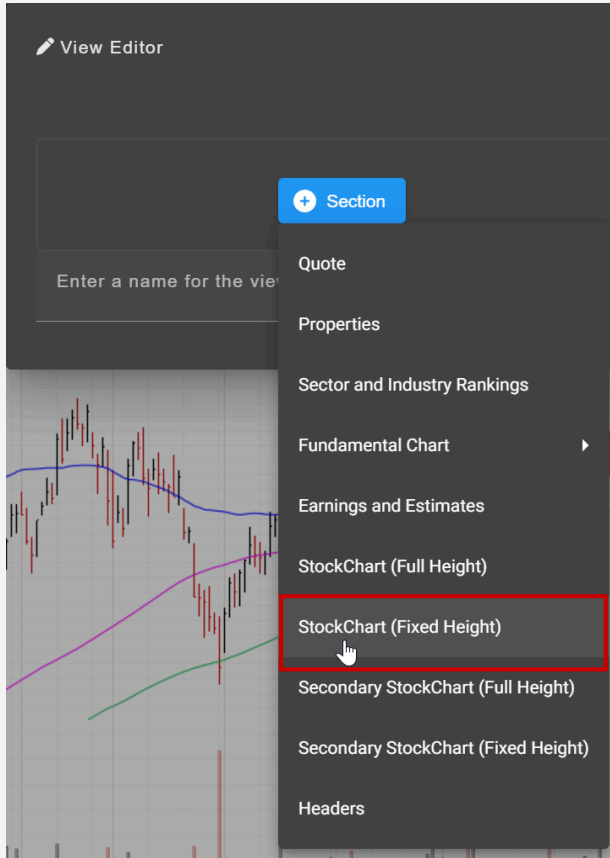
The following screen appears:

Select "StockChart (Fixed Height)," you should then see this result:
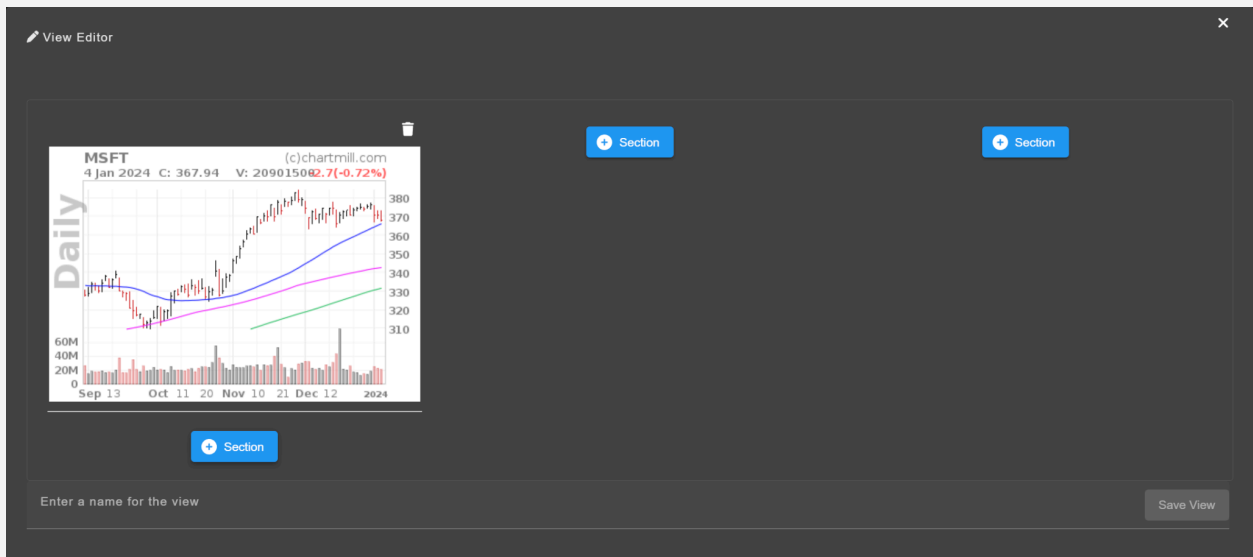
Now do the same for the middle section but select 'Secondary StockChart (Fixed Height)' for this. Below is the result:
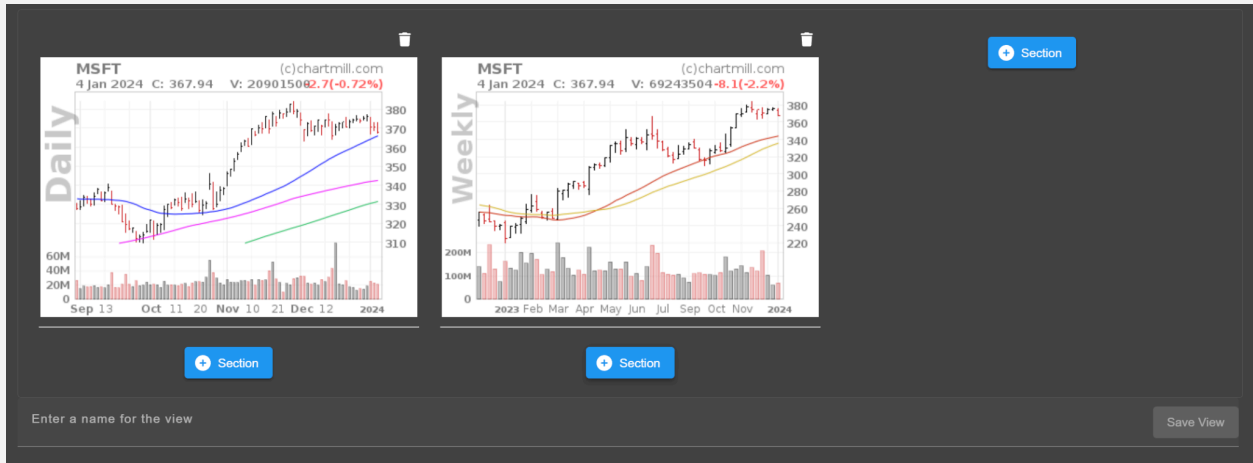
Now click on the far right section and select "properties.
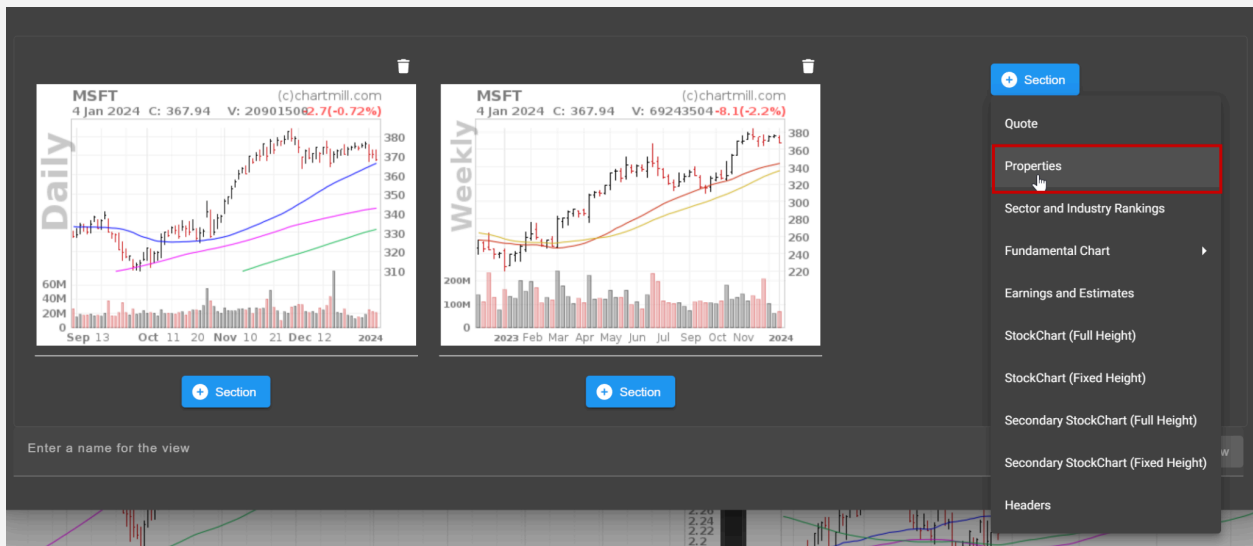
Choose 'quote', the result should now look like this:

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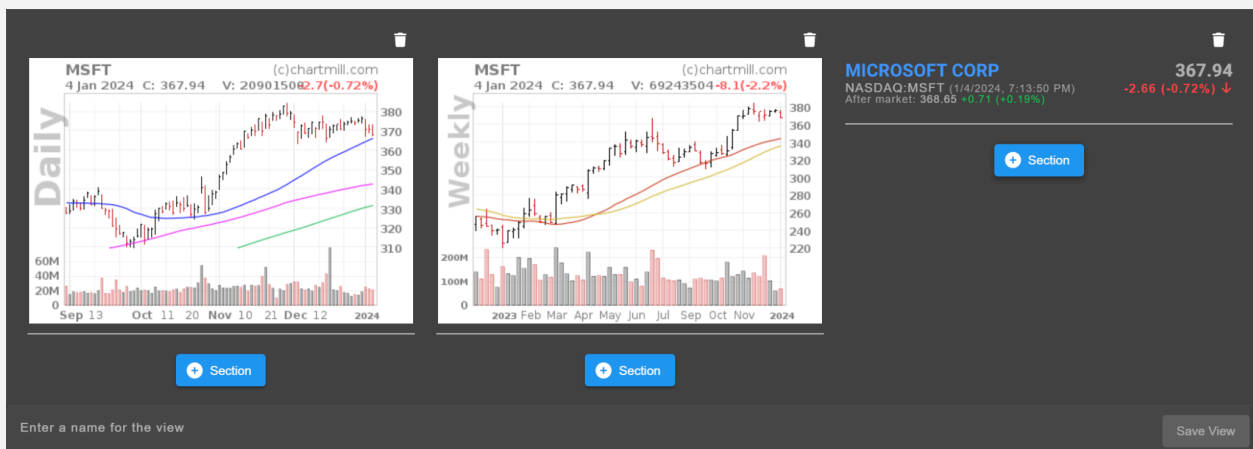
We continue with the section under 'quote'.

Again, select 'section' in the far right column after which you choose 'properties'. The following image appears:

If you want, you can specify a name for that item here or leave it blank as in this example.
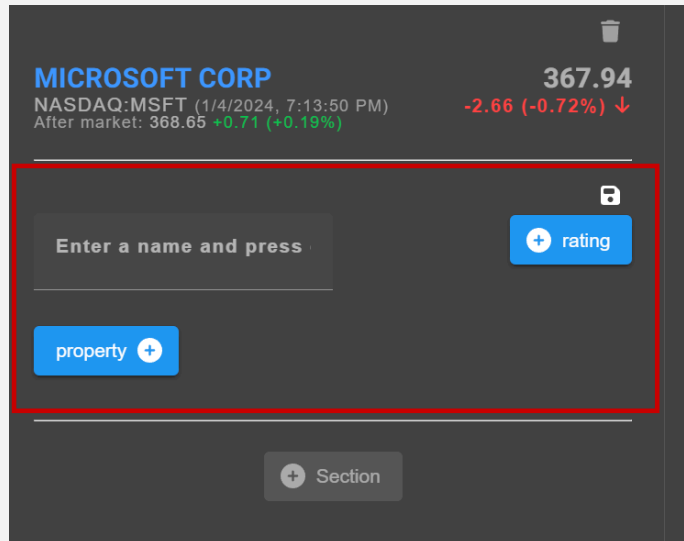
Tap the blue 'Property +' box again and then select the items from that menu as shown in this image:

Confirm your selection via the blue button.
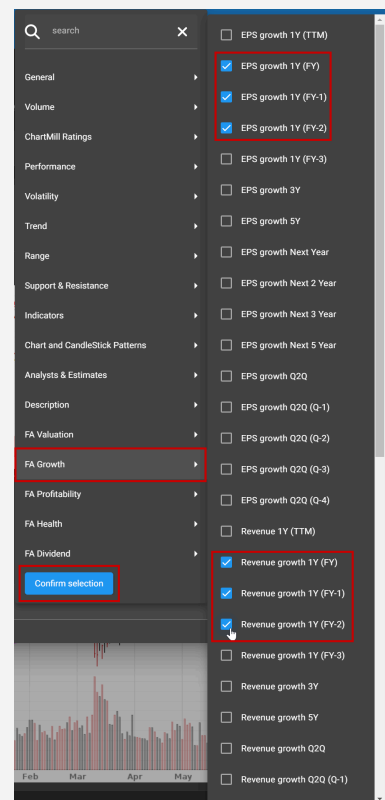
On the next screen, don't forget to press the small diskette icon to save the section!
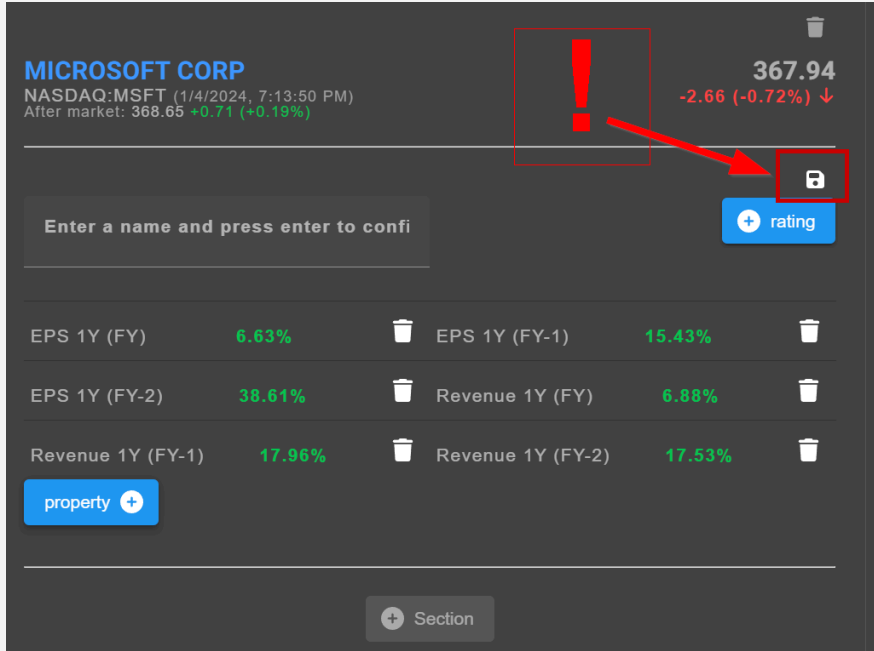
Your full screen now looks like this:

We continue in column 1, far left. Click '+ section' and choose 'properties' again.
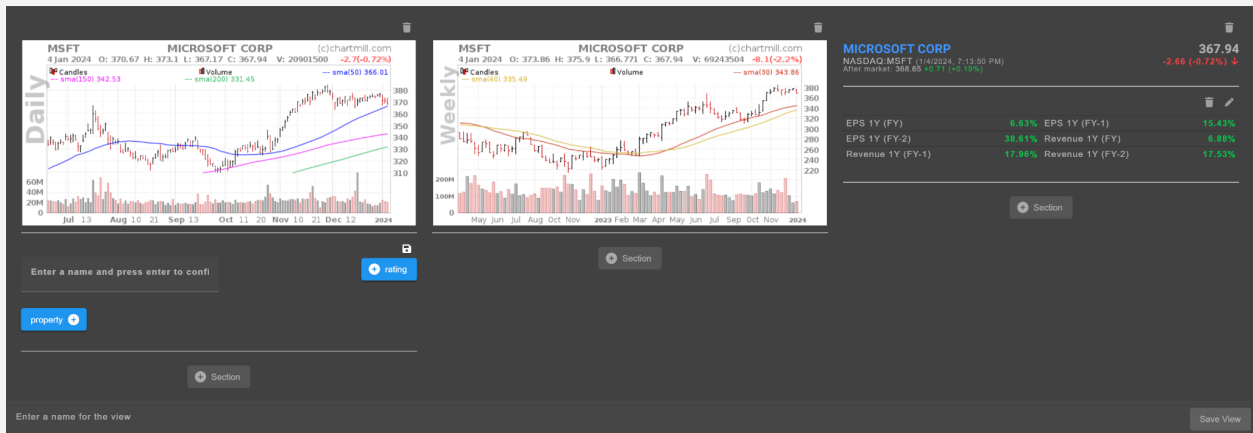
Click 'property +' and proceed as shown in the image below:
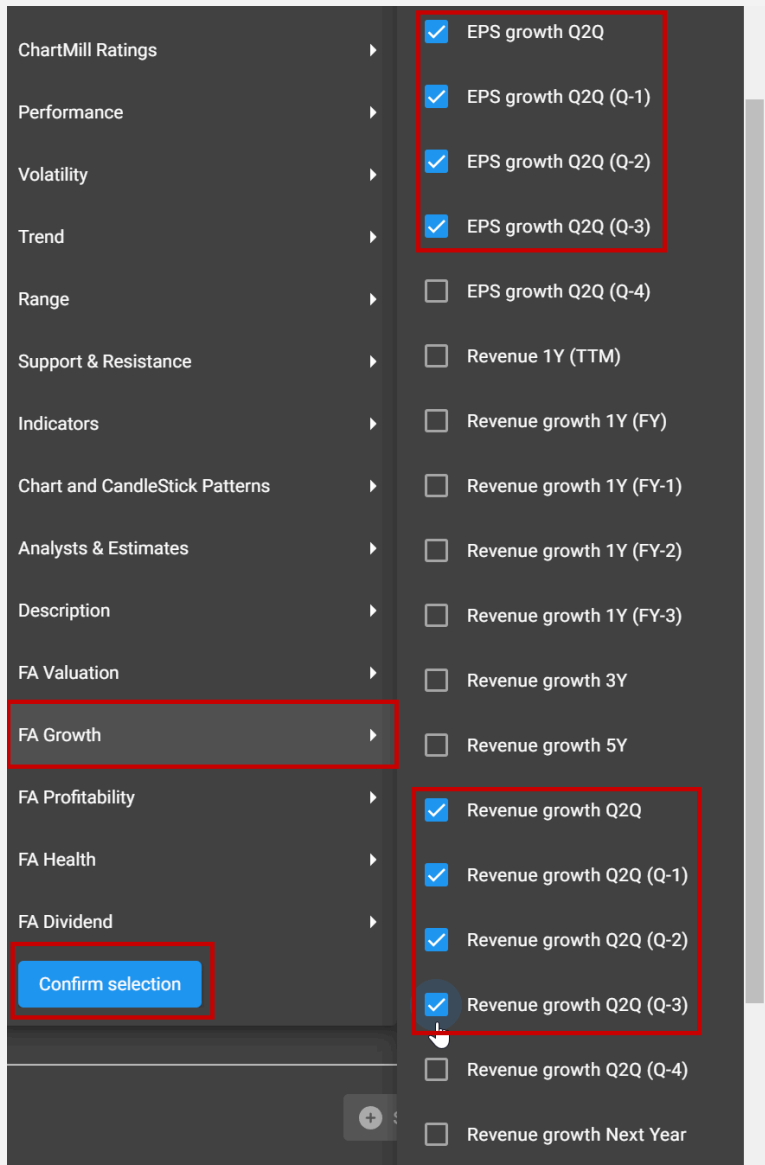
Again, in the next screen, remember to confirm the selection using the save icon at the top right. Your screen now looks like this:
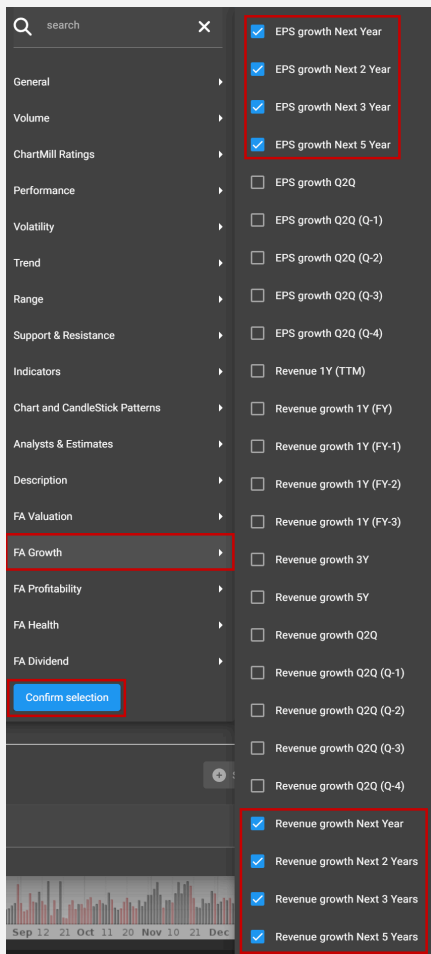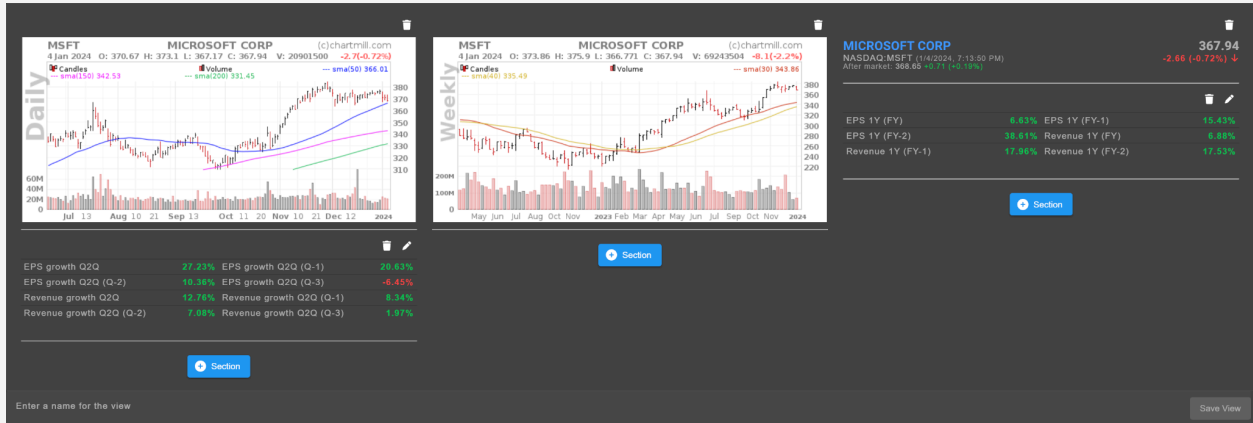
For the middle section, we proceed similarly; these are the selections you retain:

After which this is your screen:
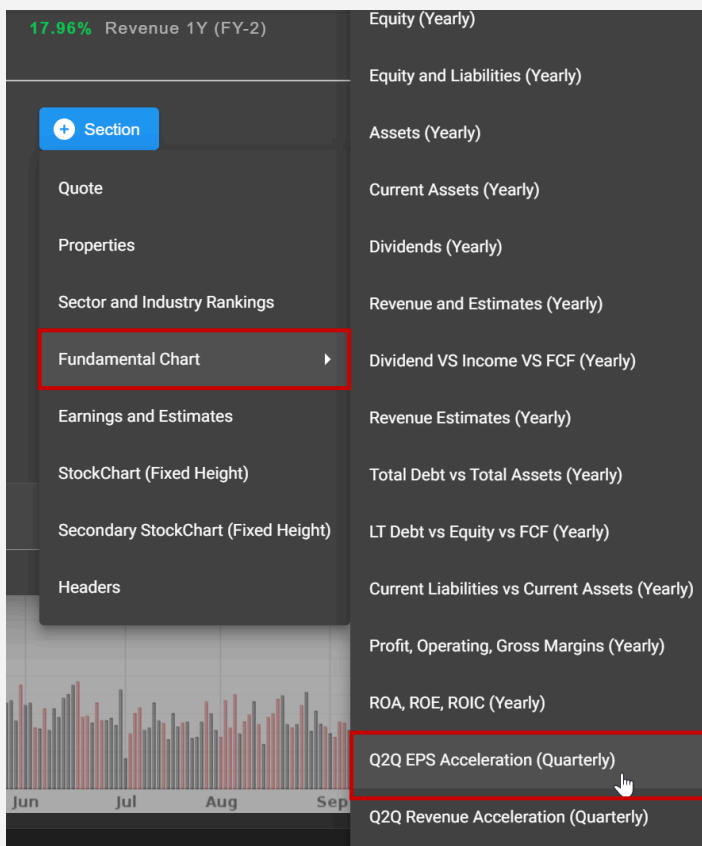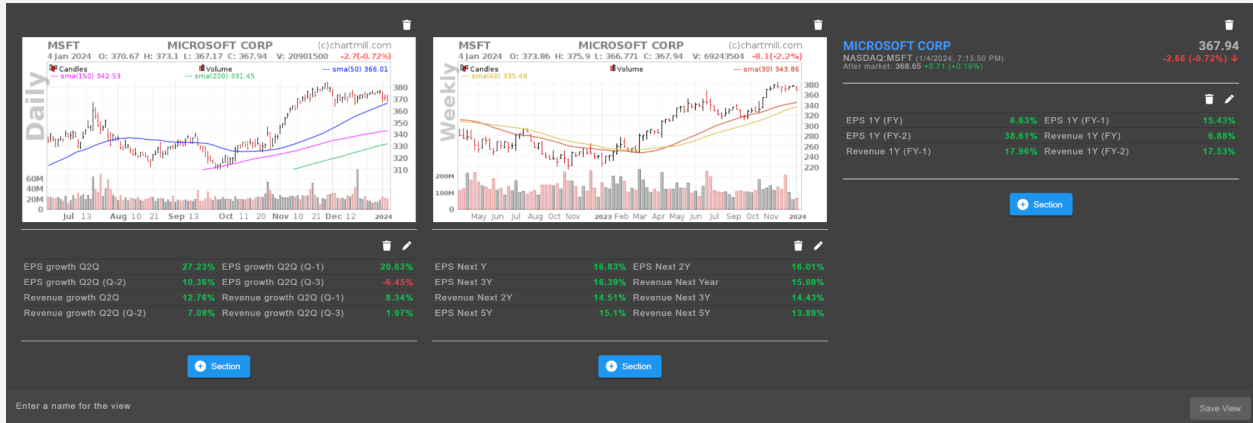
To add the two bar charts in the third column proceed as follows.

Click '+ Section' on the far right (image above) and follow the instructions in the image left:

After this, click '+ Section' again in the same right column, follow the same steps but now select 'Q2Q Revenue Acceleration (Quarterly)'. You will find this option just below the previous selection.

Your screen should now look like this:

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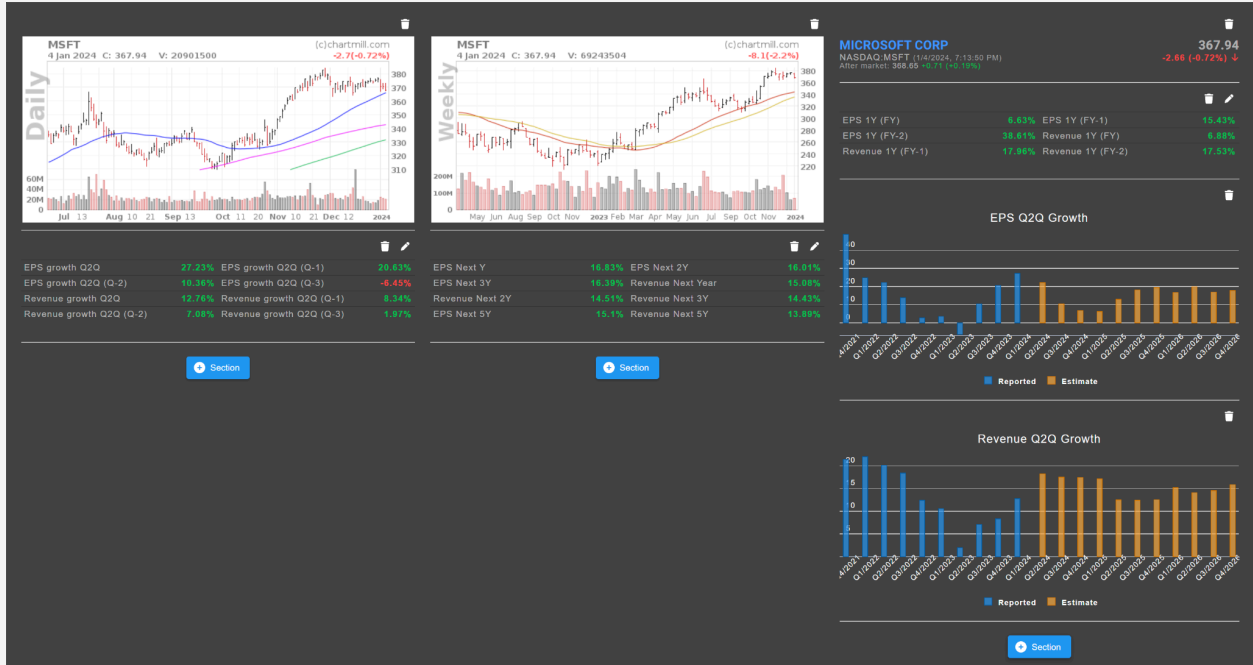
Again click '+ Section' in the far left column and then 'properties'.

Continue as the previous section we've created in the same column and choose the next options:

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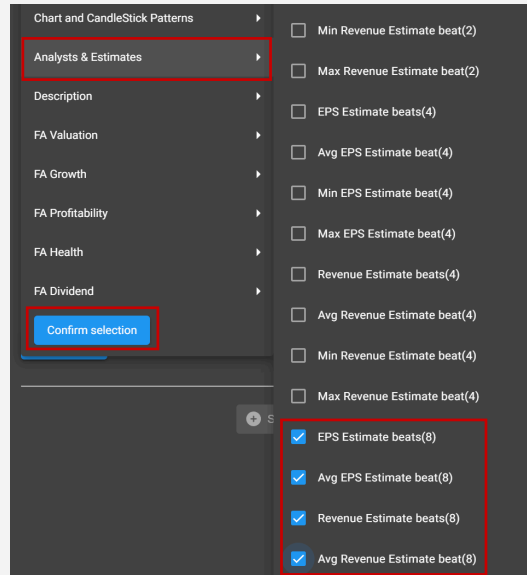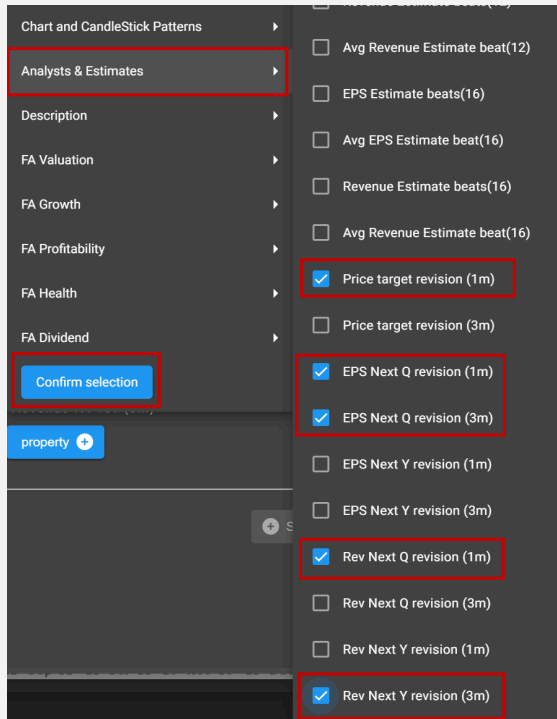
Also, create a new section in the center column with the following information:

This is your current screen after the last two sections created:
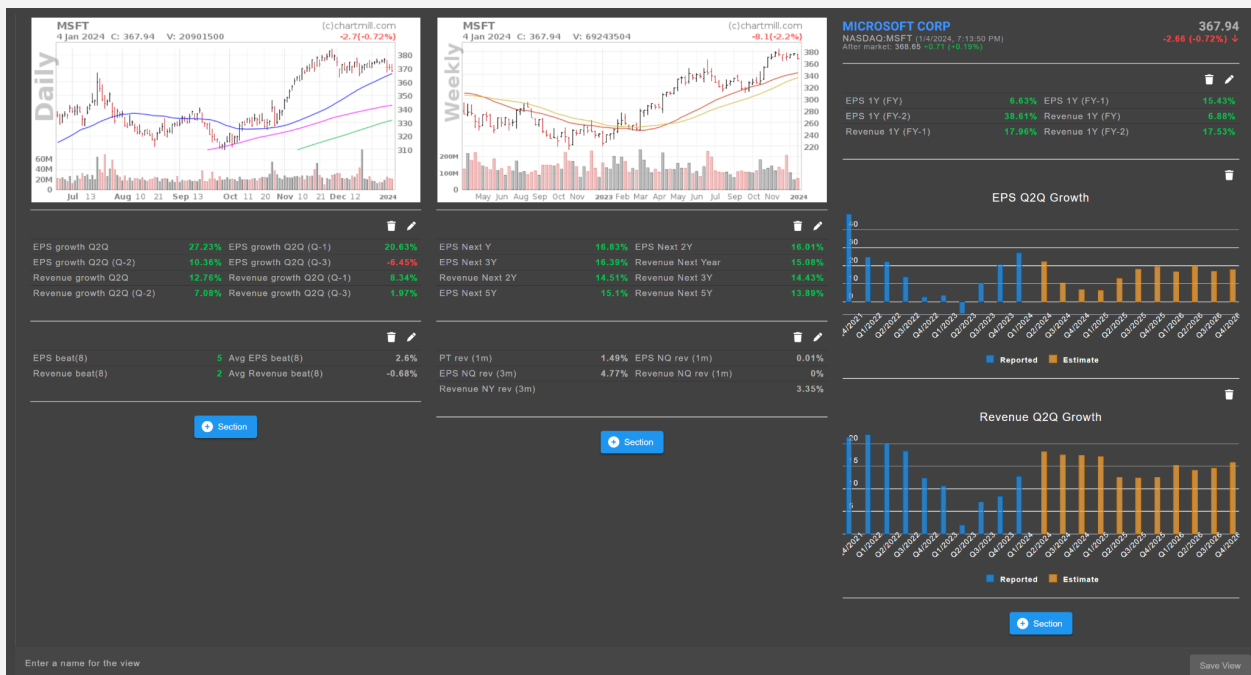
There are still 2 sections missing for the left and center columns, we will add those now. I'll show the full course one more time:
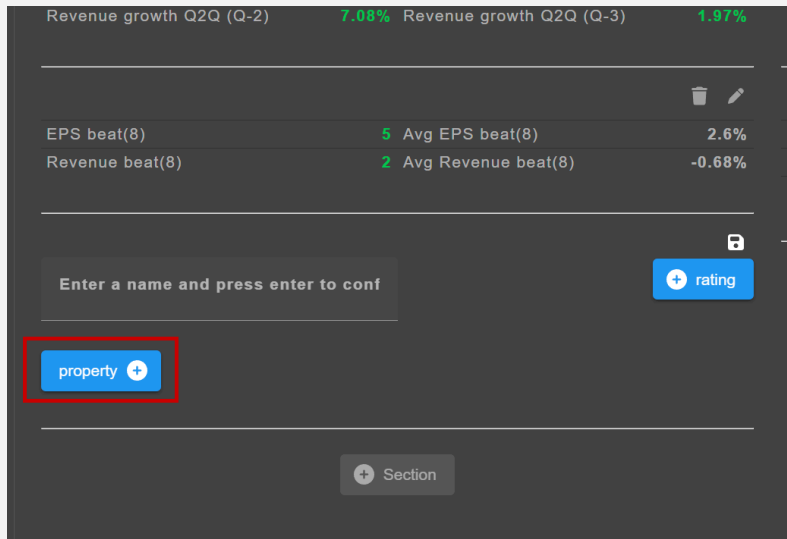
For the left column 'Click on '+ section' (see image above) and choose properties.

You will end up on the screen below where you choose 'Property +'.

Now proceed as follows:
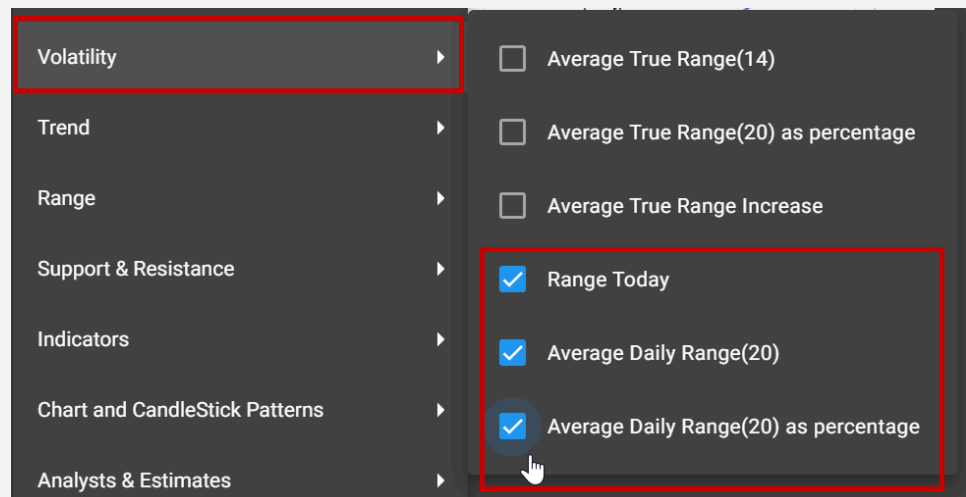
And also:
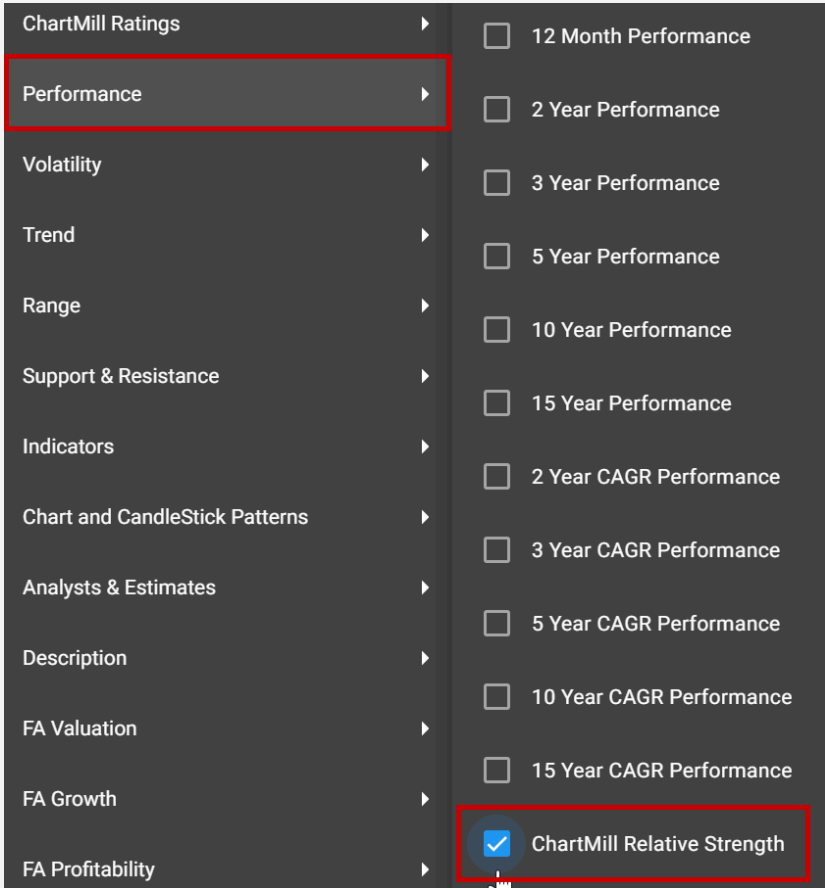
Confirm your choices via "Confirm Selection" and click on the floppy disk icon in the section:
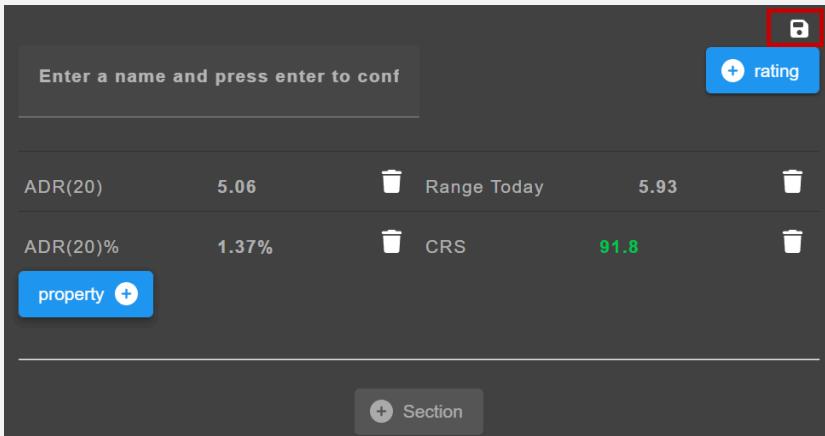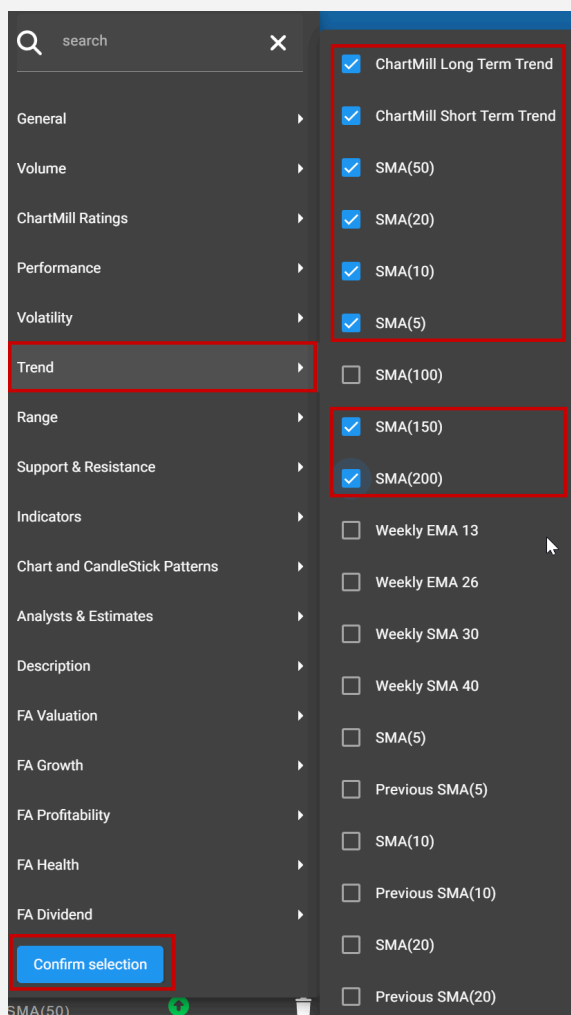
For the last middle section proceed in the same way, just select these items:

Finish by giving your view a name and saving it using the bottom right button:
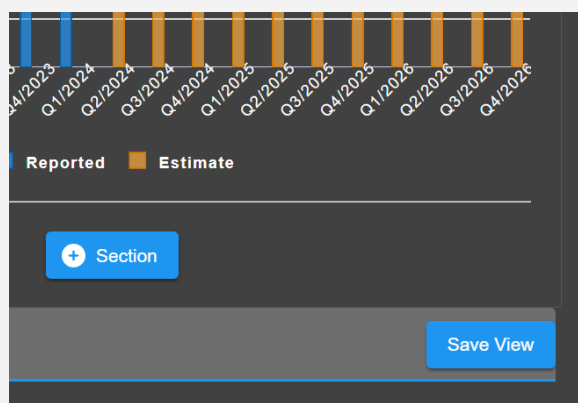
Your final screen should now look like the first image in this email.

The fastest way to get the hang of this and discover combinations that matter for your strategy is to experiment.

The example above is a 3-column layout but you can also opt to create a view consisting of only 2 columns. To compare results, try a custom table.

In the next lesson...

we will proceed to modify existing screening filters via the 'custom' tab in the stock screener.

Designing a Custom Filterscreen

Welcome to lesson 7

In the previous lesson, you learned how to personalize the way you view results by creating your own views.

Today we are going to do something similar, but with individual screening filters. ChartMill has a large number of technical and fundamental filters available through the stock screener page.

In addition to all these configured filters, there is also the possibility to tweak a lot of them. We call these "custom expressions.

The Basics of Custom Expressions

Combining different properties in a personalized filter is called an "expression," and a complete expression always has the following three parts:

- *LHS: left side of the expression*
- *Equation: the comparison function*
- *RHS: right side of the expression*

So if we want to define 'A > B',

- *'A' is defined in the LHS,*
- *the '>' is selected in the equation*
- *and finally 'B' is defined in the RHS.*

For both the LHS and the RHS, there are three options:

- A property: one of the properties described in the documentation
- A constant: for example, 5 or 34 or 0.45...etc.
- An expression: an expression with a mathematical operator (such as +, -, *, /) creating a subexpression.

No doubt this seems a bit complicated at first, but from the examples below you will quickly see that it is all quite logically structured.

Example 1 - Price vs 52-week high
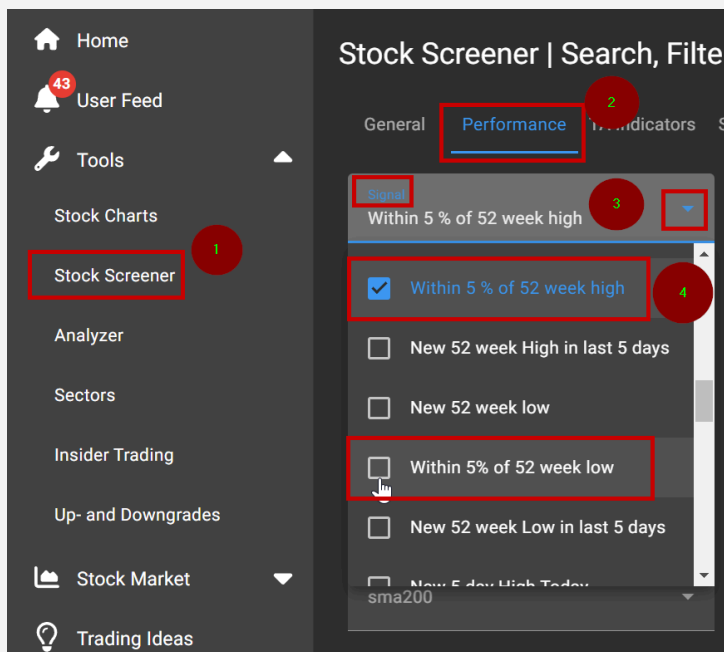
On the stock screener page, you have the option to select the filter 'Within 5% of 52-week High' or 'Within 5% of 52-week low' through the 'Performance' tab and then 'Signal'.

However, it is impossible to use other percentages as default filters. You can change that percentage but you have to use a custom expression.

For example, suppose you want to see all stocks that are at most 25% away from their 52-week high. This parameter is used in Mark Minervini's Trend Template.
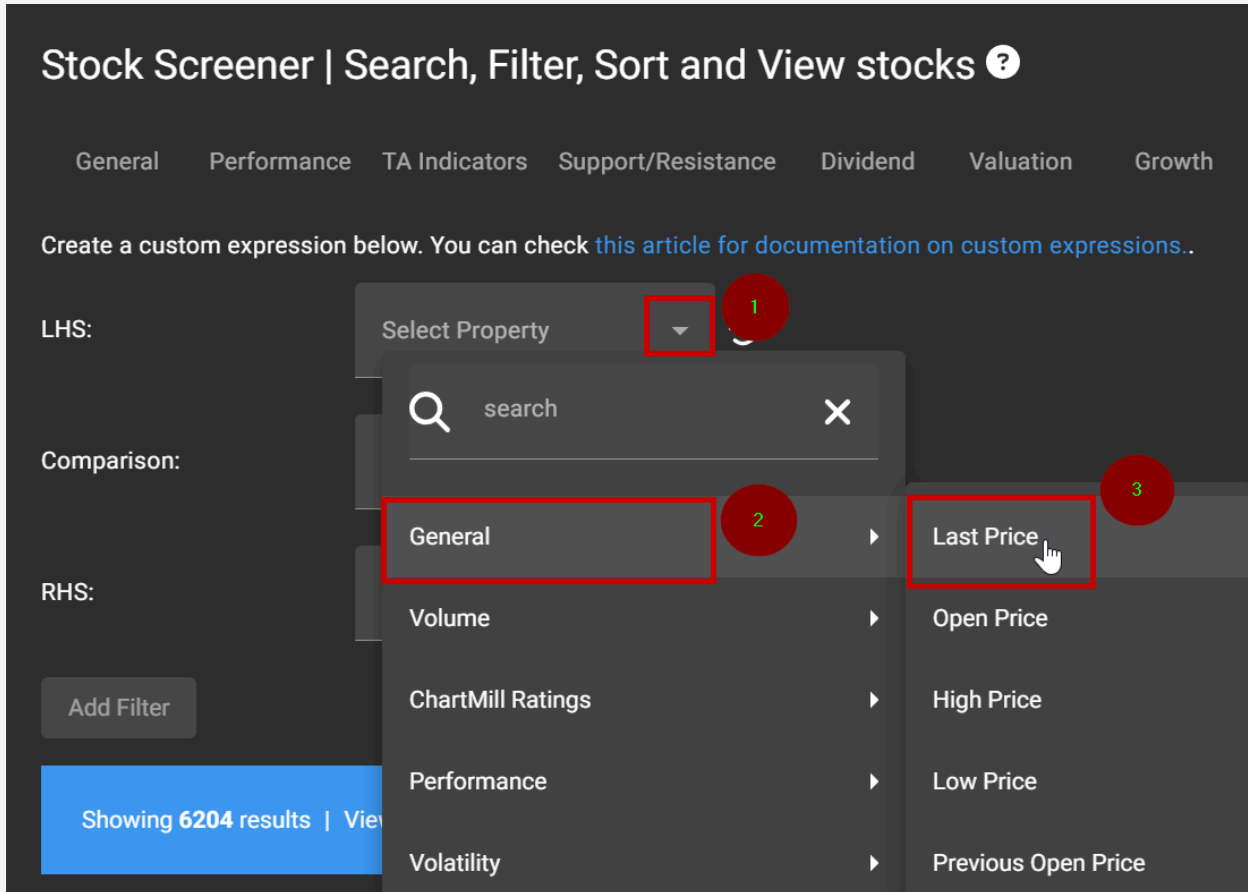
In that case, proceed as follows:

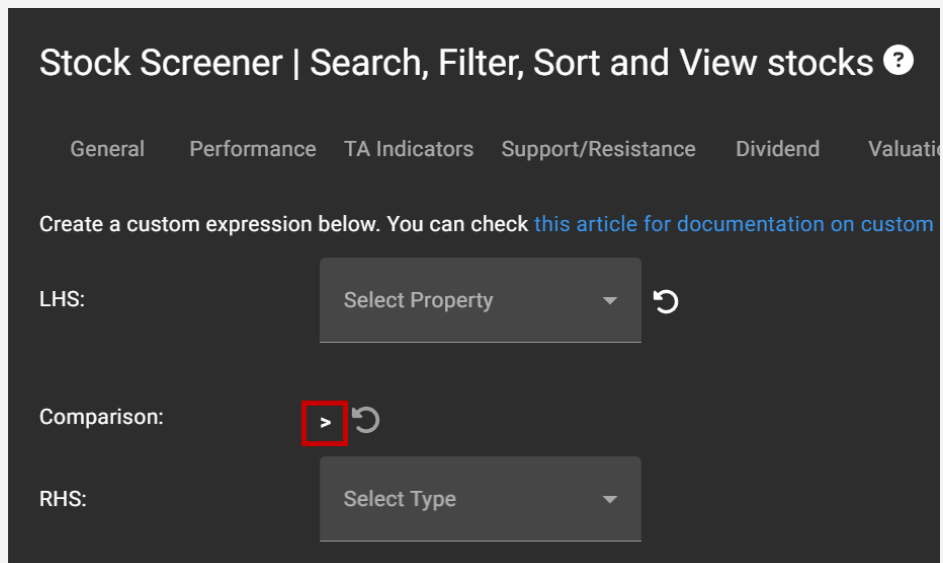Open the 'Custom' tab on the stock screener page and you will be taken to this screen:
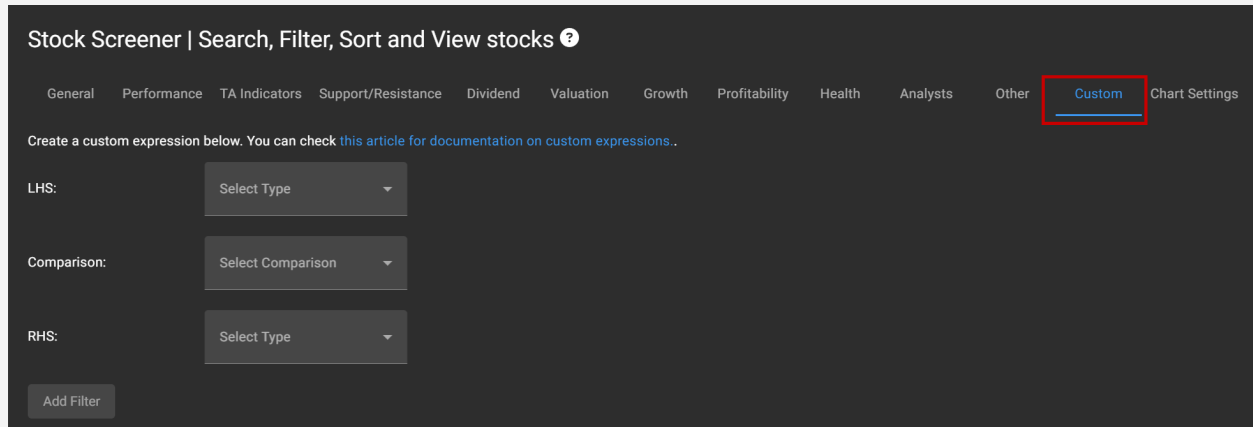
For the LHS, open the drop down menu and select "Property".
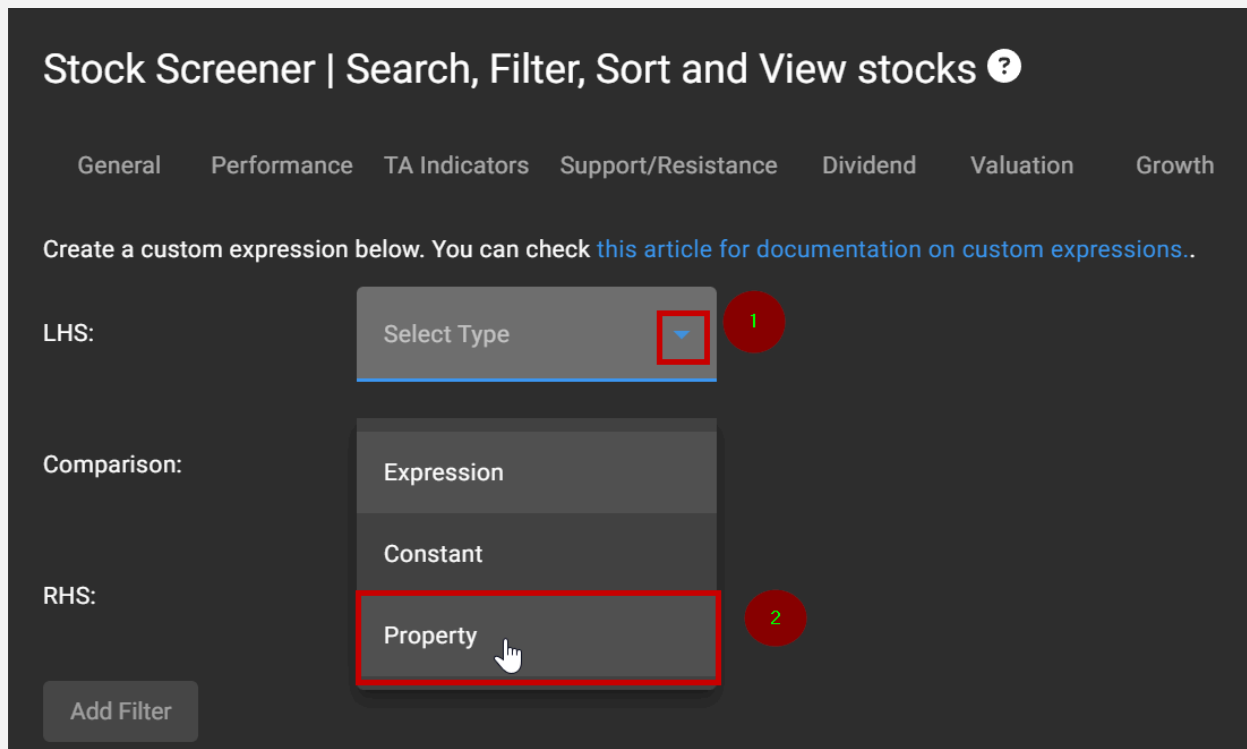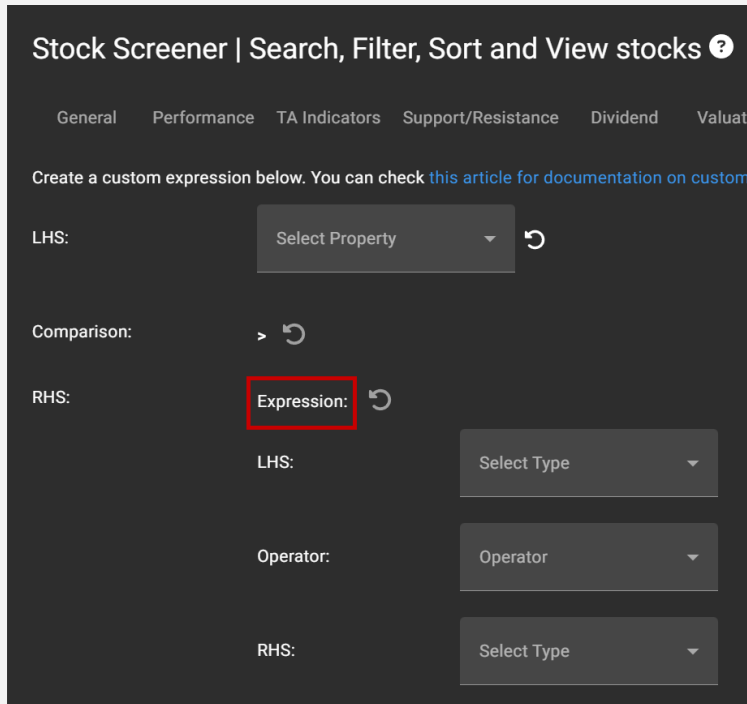
In the next screen, open the drop-down menu once again and now choose the 'Last Price' option.
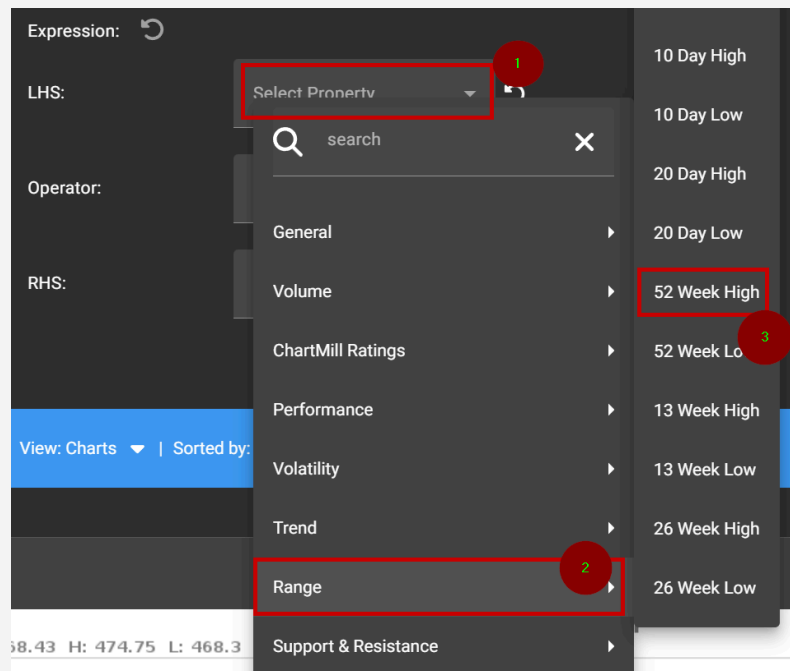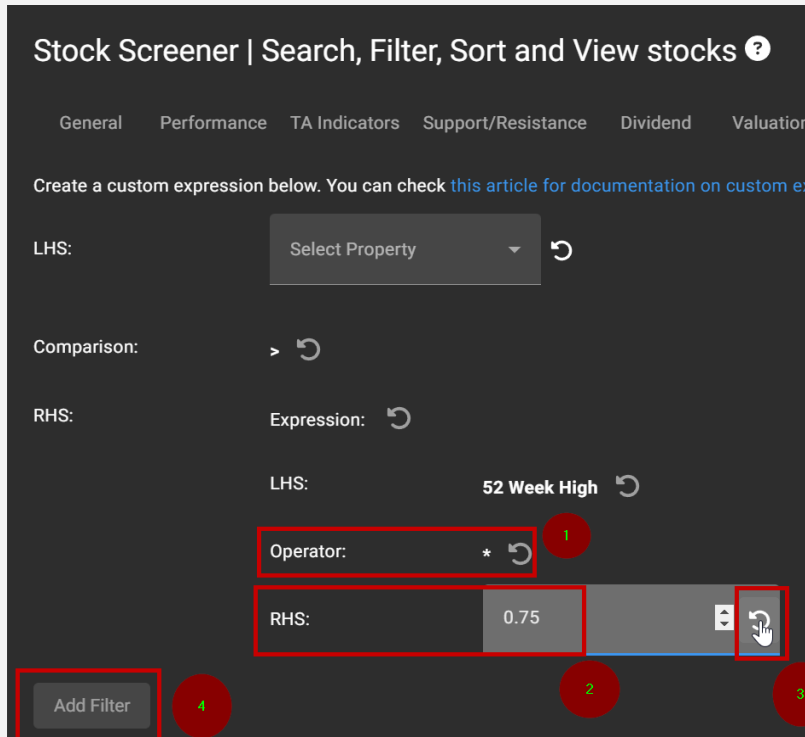

For the 'comparison' select '>'

Next, we define the RHS.

Open the drop-down menu and choose 'expression' which again gives you three fields to complete, this is a 'subexpression'.

For the LHS; open the drop-down menu and choose 'Property'.

Open the drop-down menu again and choose 'Range' and then '52-Week High' consecutively.

Now for the LHS, select 'Property' and then '52-Week High' consecutively.

For the 'operator' select '*'.

For the RHS, select 'Constant'.

Enter the value '0.75' in the empty field. Then click on the arrow (3).

The reason we use a constant of "0.75" to multiply by the "52-week high" is logical. This way we obtain a value that is at most 25% lower than the current 52-week high.

The full custom expression should now look like this:

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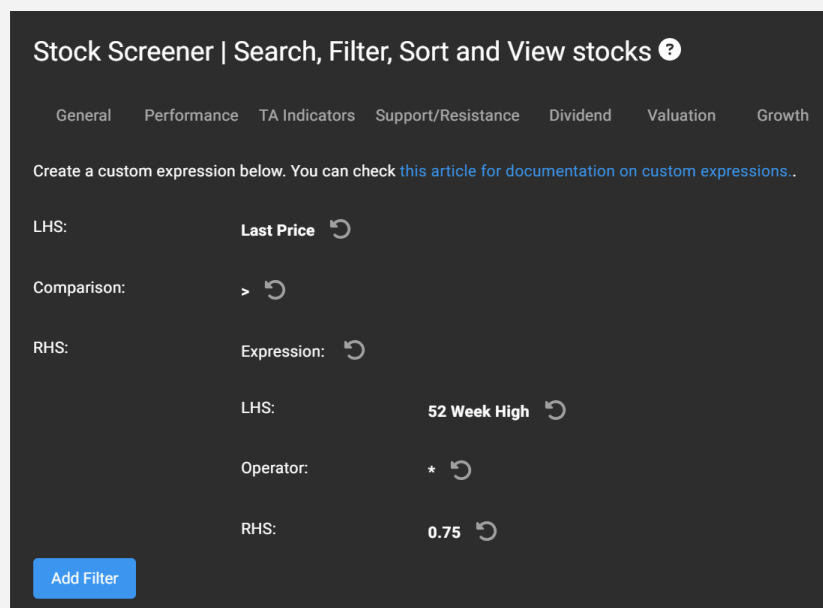
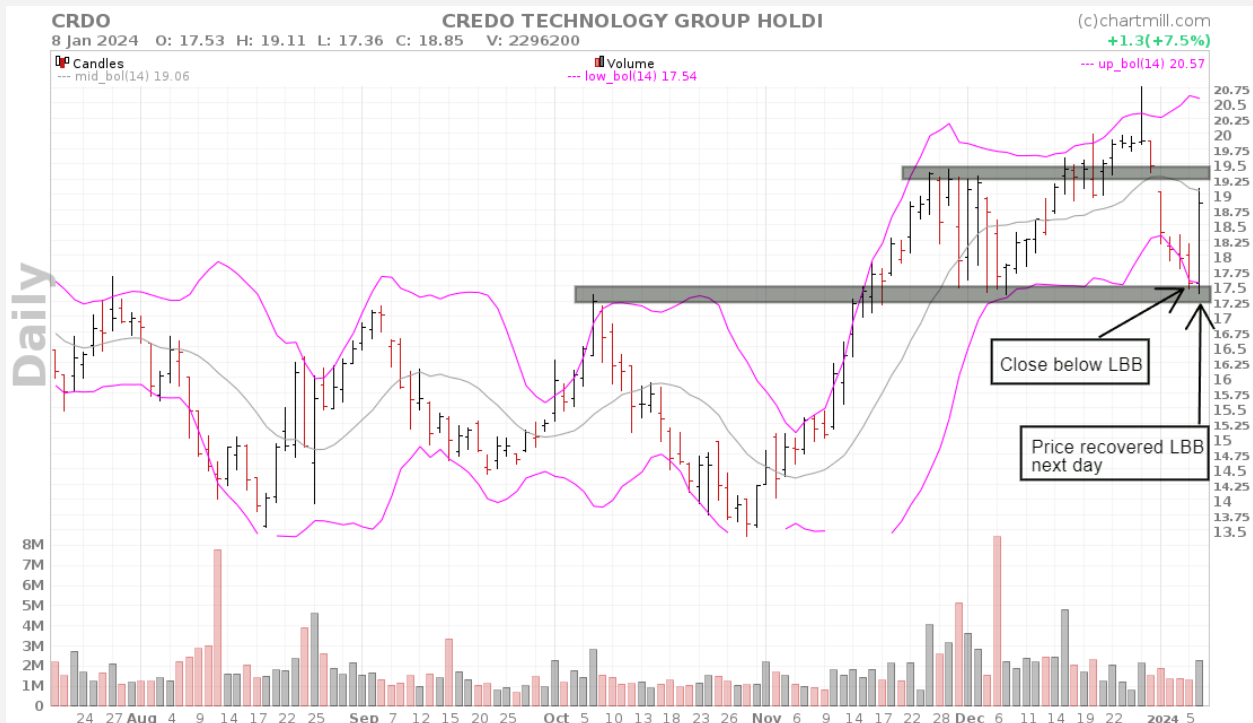To add this custom indicator, click on "Ad Filter.

It is now visible in the filter field.
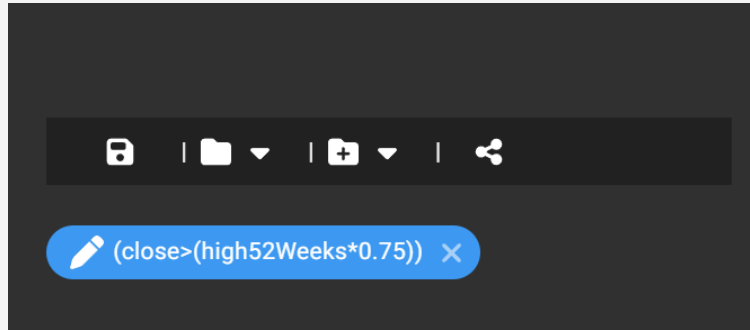
Example 2 - Defining Multi Day Price Patterns

The added value of using custom expressions is particularly noticeable when you want to define patterns that include both today's and yesterday's price.

An example of this is found in this Mean Reversion/Bullish Retracement strategy.

We are searching for a strong reversal pattern based on the price movement for the last two days as shown in the chart above. The stock

shows a rising trend and on the second last trading day, the price closed below the lower Bollinger band (LBB). However, the current close is again above the lower Bollinger bands and even above the high of the previous trading day.

Defining that previous trading day is not possible with a standard built-in filter. To do so, we need to use a custom expression.

Condition to be defined:

- the previous trading day's close must be below the value of the lower Bollinger band.
- The last trading day's close is again above the LBB and above the high of the previous bar.

Defining condition 1 as a custom expression

For the LHS:
Open drop down menu > select 'Property' > Open drop down menu again > select 'General' > select 'Previous Close'
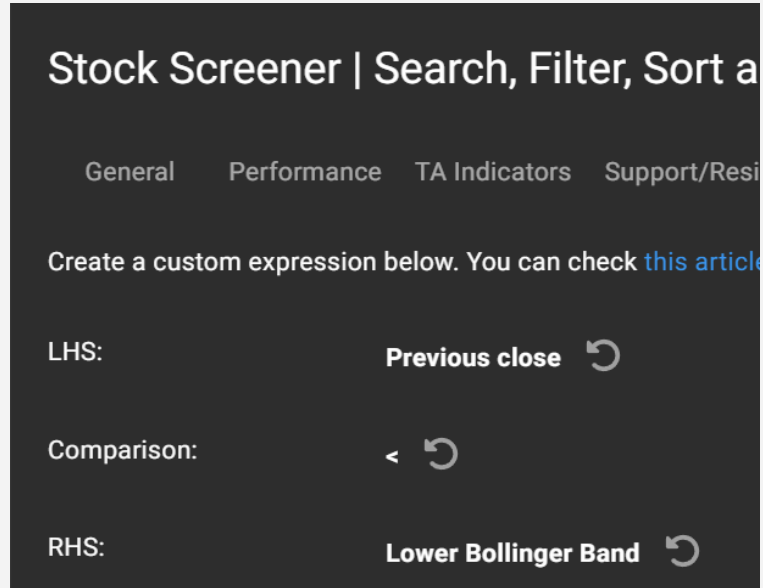
For the Comparison:
Select '<'

For the RHS:
Open drop-down menu > select 'Property' > Open drop-down menu again > select 'Indicators' > select 'Lower Bollinger Band".
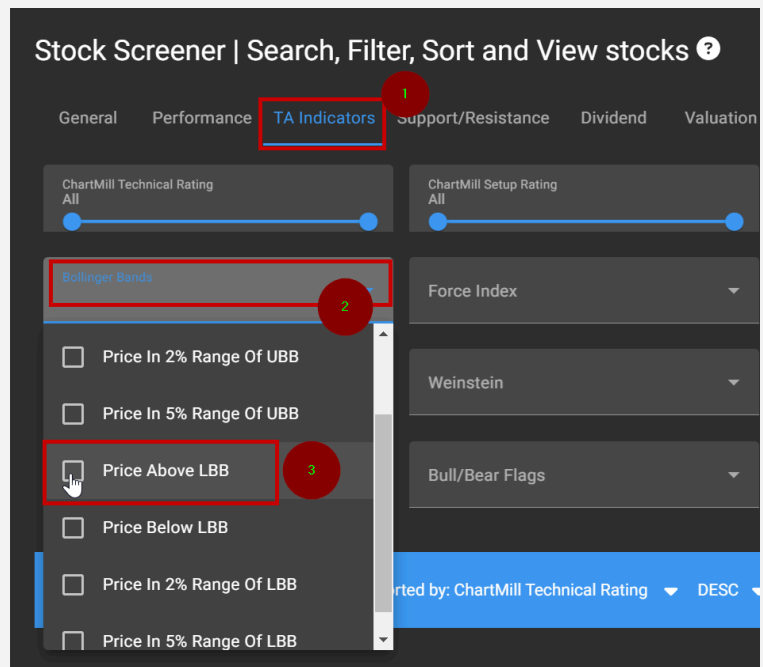
The custom expression should now look like this:

Defining condition 2

The condition that the price must close above the LBB doesn't need to be defined as a custom expression.

You can choose that option by default with the indicator itself.

To define the condition that the last price must close higher than the previous day requires another custom expression.

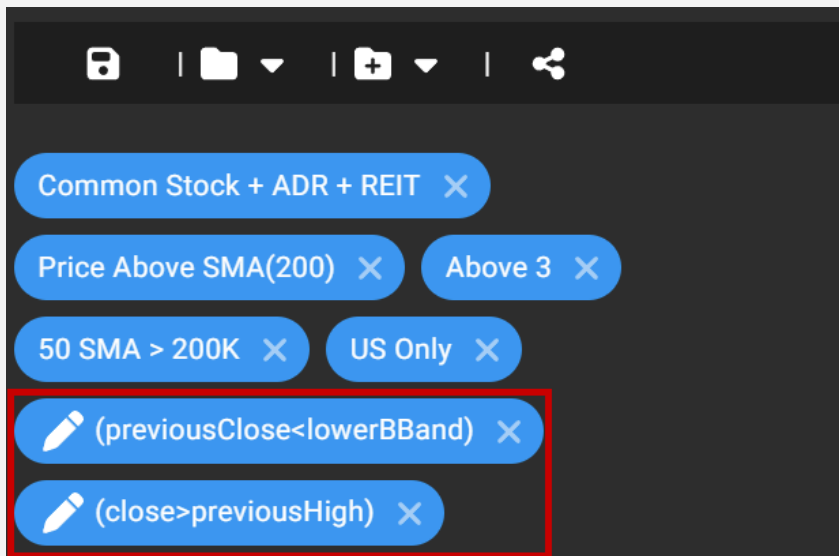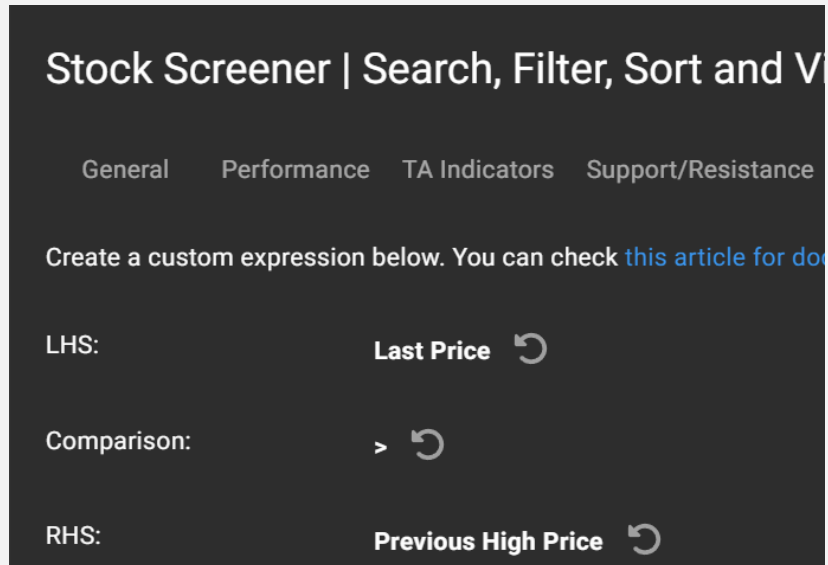This is done as follows:

For the LHS:
Open drop-down menu > select 'Property' > Open drop-down menu again > select 'General' > Select 'Last Price'

For the Comparison:
Select '>'

For the RHS:
Open drop-down menu > select 'Property' > Open drop-down menu again > select 'General' > select 'Previous High Price".

Stock Screener | Search, Filter, Sort and V

General   Performance   TA Indicators   Support/Resistance

Create a custom expression below. You can check this article for do

LHS: Last Price ↺

Comparison: > ↺

RHS: Previous High Price ↺

Common Stock + ADR + REIT ✕

Price Above SMA(200) ✕   Above 3 ✕

50 SMA > 200K ✕   US Only ✕

✎ (previousClose<lowerBBand) ✕

✎ (close>previousHigh) ✕

Finally, you have the following two custom expressions visible in the filter field:

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Some examples of low risk bullish setups coming from this screen:

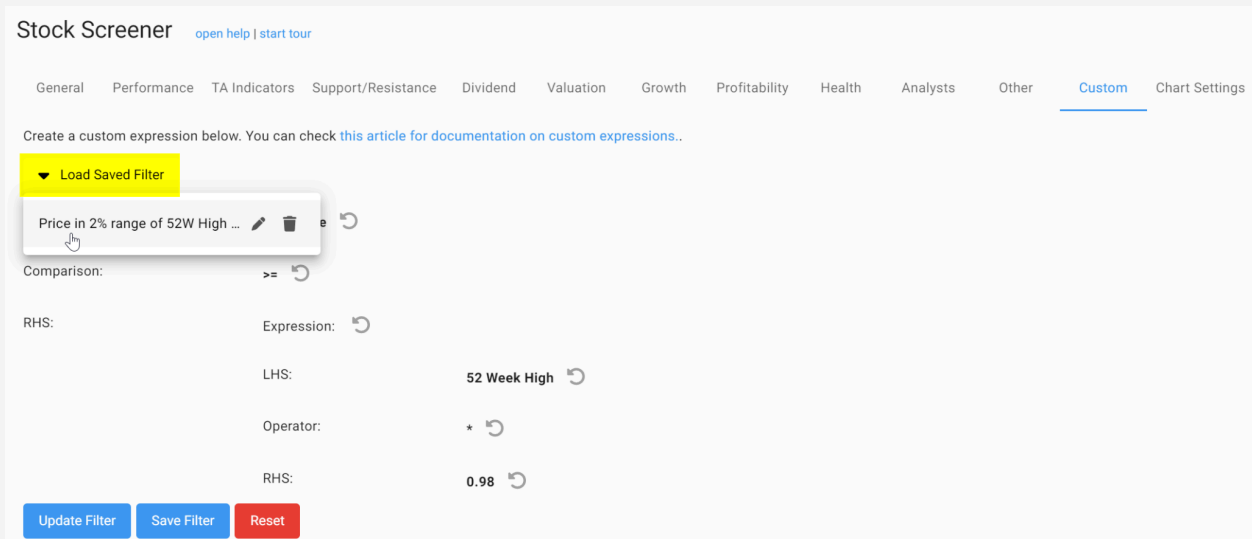# Save and Modify Custom Expressions

Once you've created a custom filter, you'll see these new buttons appear. Click 'Save Filter' and choose a name for your new custom expression, then press 'Save'.

Now open the 'Load Saved Filter' menu where you will see your new custom expression appear. You can now apply this filter to any watch list, trade idea or screen.

Saved custom expressions can also be modified. To do this, first click on the pencil icon next to the custom expression you want to change. Make the changes and click "Update Filter" and then "Save Filter."

Note, when making a change, always click "Update Filter" first and only then "Save Filter," otherwise the old formula will not be overwritten!
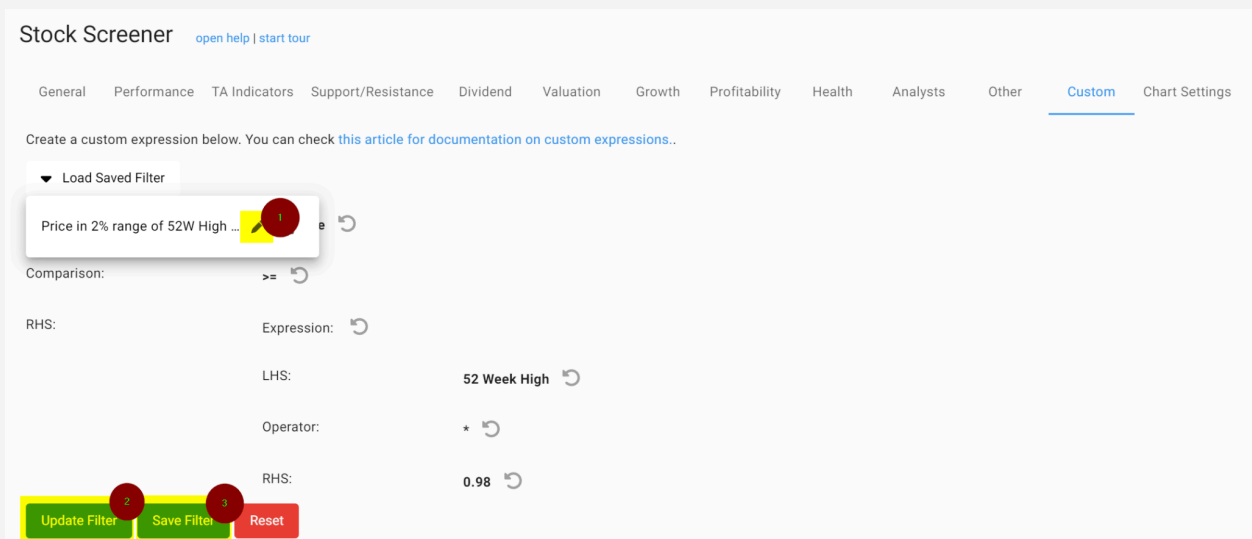
As the examples above show, custom expressions offer unprecedented opportunities to refine your filters in detail. You can use them to refine standard filters, or you can develop completely new filters and chart patterns.

It is one of the most powerful applications in ChartMill and its capabilities will continue to be developed in the future.

This may take some time to fully master, but don't let that discourage you from using it... Practice makes perfect!

In the next lesson...

we will talk about "sectors and industries" and how ChartMill can help you identify market leaders in an early stage when new bull markets emerge.

Sectors and Industries: Finding the Strongest Performers

On day 1 of this email course, we already wrote that for any strategy (whether fundamental or technical) there are good, not so good and downright bad market conditions and that there is simply no single strategy that will be successful in all market conditions.

Market Trend & Sentiment; Top-Down View

For active strategies in particular, it is crucial to be well aware of prevailing market conditions for two specific reasons:

- *To be able to respond to new opportunities in a timely manner*
- *To know when it is better to stand on the sidelines for a while and maintain mostly cash*

Breakouts, for example, work very well in a strong bull market but the number of false breakouts will be a lot higher when markets are sluggish or downright negative.

Keeping an eye on some broad market index ETFs and breadth indicators on [our Market Monitor page](#) is a good starting point to keep track.
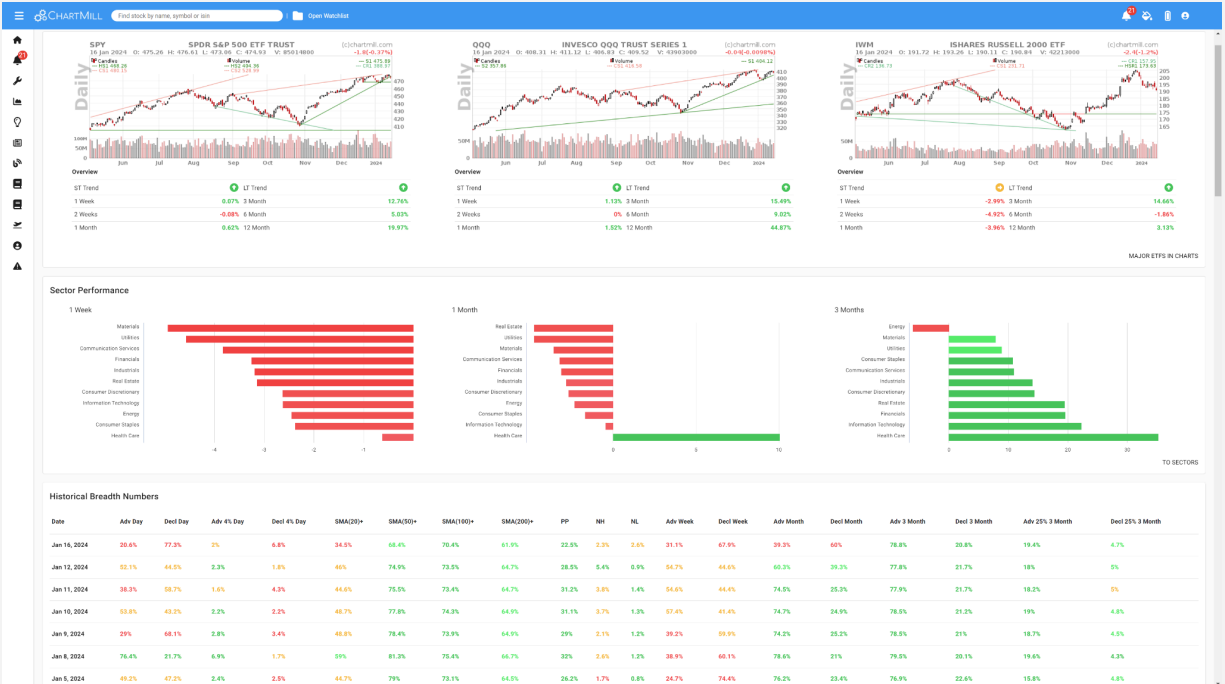
On that page, you get an overview of the SPY, QQQ, and IWM ETFs with their short-, medium--, and long-term price trends. The section beneath shows which sectors performed the strongest over the past week, month, and three months.

Finally, you will find a series of interesting breadth indicators that provide more insight into current market sentiment.

The number of stocks quoting above an important SMA, for example, or the number of new highs compared to the number of new lows.

The number of stocks that rose more than 4% in one day provides insight into short-term momentum while the number of stocks that have risen at least 25% in the past 3 months is indicative of medium-term momentum.

In addition, it pays to closely monitor different sectors and industries. Which ones are holding strong in a weak market? Which sectors have the strongest players when the market is bullish?

Once a negative market trend bottoms out, you will see the first signs of accumulation in specific industry groups and subgroups.

That's what [the sectors page](#) is meant for. With just a few clicks, you get valuable insights into the performance of multiple timeframes of sectors, industry groups, and industries.

For example, want to know which specific US industries have performed the strongest in the last two weeks?

Click on 'industry' and then rank the results based on their 'two-week performance' by clicking at the top of the column. Click again if you want to see results in ascending order.

Below are the results as of 01/19/2024:

In this example, it is "Marine Transportation," "Transportation Infrastructure" and "Distributors" that have performed best.

Clicking on any of those industries will take you to the stock screener page with all the tickers that are part of it.

The image on the next page shows all stocks in the 'Marine Transportation' group with a minimum price of $5 and a minimum average trading volume of 100,000, ranked according to their 1-week performance.
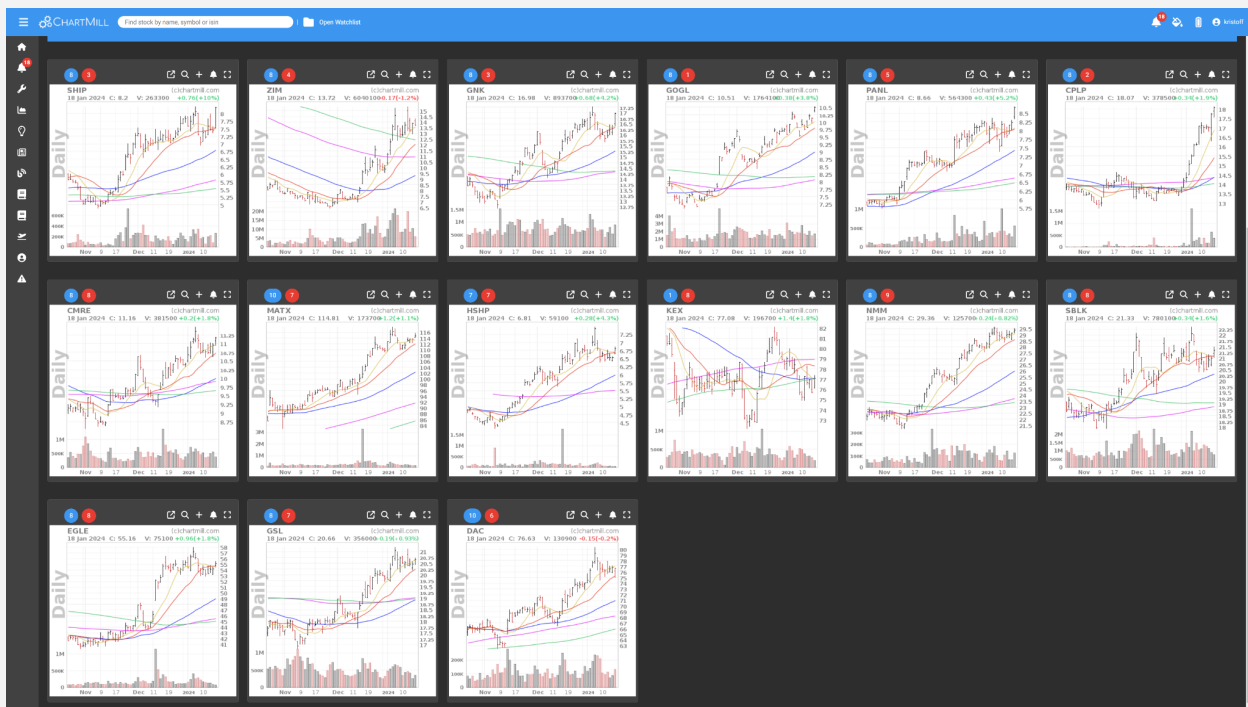
You can apply this approach equally well to the entire sector or industry group. It allows you to view a lot of strong-performing stocks in a short time and add interesting candidates to your watchlist.

Bottom-Up Approach

Recognizing those specific industries and the stocks that are part of it, promptly, is critical to the long-term performance of your portfolio. Why? Because that information won't show up in broad market indexes until much later!

By taking a bottom-up approach, starting from the individual stocks and the industry they are part of, you will be able to identify the future leaders much faster.

The above way shows how to start from the sector/industry level. Another way is to start from the performance of individual stocks.

For this, you can proceed as follows, for example.

Open the stock screener and first set some basic parameters such as minimum price, and minimum volume,... This is intended to keep very low-priced stocks with low volume out of the screen.
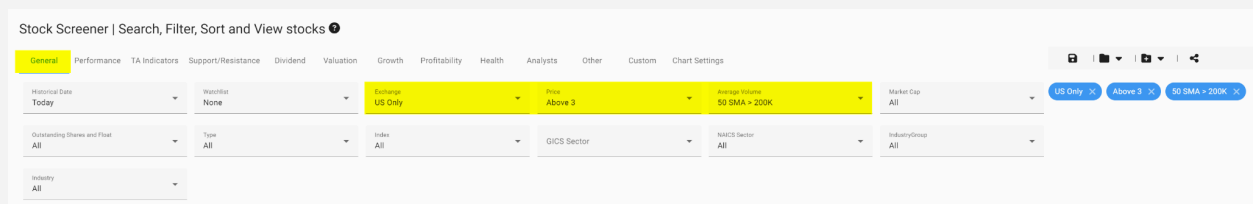
Then open the 'Performance' tab and select 'new 52-week high'. You will now see all US stocks that reached a new 52-week high on the most recent trading day.

By additionally filtering on the individual sectors you will quickly find out if there are specific sectors with remarkably high results.

Once you have found the most interesting sector, select it from the drop-down menu 'GICS Sector' under the 'General' tab.

In the example below we have selected the sector 'Health Care'.
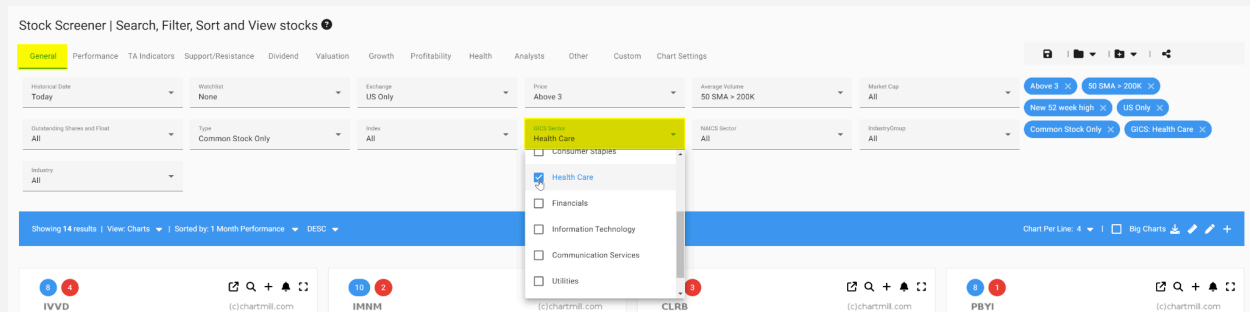
On the left in the blue bar, you will see the number of results, in this case, 14.

In the same way, you can now proceed and view all other sectors. We will take a closer look at the sectors with the most results.

The 52-week high filter from the screenshot above is a snapshot dated January 16, 2024, after the close. Two sectors had the largest number of results, being "Health Care" (14) and "Information Technology" (13).

Now look at only the results of these two specific sectors. In doing so, choose a table view that includes separate columns for the 'sector', 'industry group', and 'industry'.

Such a table is currently not available by default but you can easily create your own. You can see exactly how to do this in this video (from 01:54).

The table results look like this:

Stock Screener | Search, Filter, Sort and View stocks

Showing 27 results | View: Sector/IndustryGroup/Industry + Performance/RS/ADR | Secondary None | Sorted by: 1 Month Performance DESC

Symbol	Name	GICS Sector	GICS IndustryGroup	GICS Industry	Beta	% Chg	1 Week	1 Month	3 Month	6 Month	12 Month	CRS	ADR(20)%	Action
IVVD	INVIVYD INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	0.98	-3.3%	1.99%	138.37%	159.49%	180.82%	126.52%	99.06	12.33%	
IMNM	IMMUNOME INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	0	5.85%	16.08%	89.27%	59.56%	95.65%	171.54%	98.59	6.64%	
CLRB	CELLECTAR BIOSCIENCES INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.29	5.41%	15.63%	39.62%	40.68%	78.74%	145.03%	98.08	8.24%	
PBYI	PUMA BIOTECHNOLOGY INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	2.35	10.01%	12.86%	39.49%	136.52%	53.67%	24.2%	97.53	5.72%	
MRUS	MERUS NV	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.28	3.19%	1.36%	33.03%	65.67%	29.15%	128.31%	98.19	4.65%	
SLNO	SOLENO THERAPEUTICS INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	-1.72	7.59%	10.79%	20.93%	90.35%	793.84%	1720.24%	99.99	4.95%	
CAMT	CAMTEK LTD	Information Technology	Semiconductors & Semiconductor Equipment	Semiconductors & Semiconductor Equipment	1.9	4.33%	7.68%	18.96%	41.77%	67.83%	176.44%	98.47	3.94%	
IDYA	IDEAYA BIOSCIENCES INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.05	1.96%	10.77%	18.41%	60.22%	87.42%	129.84%	98.14	3.35%	
GKOS	GLAUKOS CORP	Health Care	Health Care Equipment & Services	Health Care Equipment & Supplies	1.2	0.86%	8.84%	17.84%	31.66%	19.22%	83.91%	95.5	3.88%	
MGNX	MACROGENICS INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.06	1.96%	3.81%	17.19%	125.41%	122.65%	88.43%	98.41	5.5%	
NVDA	NVIDIA CORP	Information Technology	Semiconductors & Semiconductor Equipment	Semiconductors & Semiconductor Equipment	1.57	3.06%	7.9%	16.61%	36.23%	27.25%	216.06%	98.83	2.26%	
AMD	ADVANCED MICRO DEVICES	Information Technology	Semiconductors & Semiconductor Equipment	Semiconductors & Semiconductor Equipment	1.64	8.31%	8.59%	15.03%	55.92%	43.07%	126.55%	97.98	2.84%	

Because the industry group/industry is also visible in this view, you can fine-tune further. For example, it is clearly noticeable that for the 'Health Care' sector most of the stocks come from the 'Biotechnology' industry.

By selecting only 'Biotechnology' in the 'industry' section, only those specific stocks are shown.

Stock Screener | Search, Filter, Sort and View stocks

Showing 10 results | View: performance | Secondary None | Sorted by: 1 Month Performance DESC

	Symbol	Name	GICS Sector	GICS IndustryGroup	GICS Industry	Beta	% Chg	1 Week	1 Month	3 Month	6 Month	12 Month	CRS	ADR(20)%	Action
IVVD	INVIVYD INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	0.98	-3.3%	1.99%	138.37%	159.49%	180.82%	126.52%	99.06	12.33%	
IMNM	IMMUNOME INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	0	5.85%	16.08%	89.27%	59.56%	95.65%	171.54%	98.59	6.64%	
CLRB	CELLECTAR BIOSCIENCES INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.29	5.41%	15.63%	39.62%	40.68%	78.74%	145.03%	98.08	8.24%	
PBYI	PUMA BIOTECHNOLOGY INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	2.35	10.01%	12.86%	39.49%	136.52%	53.67%	24.2%	97.53	5.72%	
MRUS	MERUS NV	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.28	3.19%	1.36%	33.03%	65.67%	29.15%	128.31%	98.19	4.65%	
SLNO	SOLENO THERAPEUTICS INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	-1.72	7.59%	10.79%	20.93%	90.35%	793.84%	1720.24%	99.99	4.95%	
IDYA	IDEAYA BIOSCIENCES INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.05	1.96%	10.77%	18.41%	60.22%	87.42%	129.84%	98.14	3.35%	
MGNX	MACROGENICS INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	1.06	1.96%	3.81%	17.19%	125.41%	122.65%	88.43%	98.41	5.5%	
VRTX	VERTEX PHARMACEUTICALS INC	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	0.77	0.94%	4.38%	7.6%	20.9%	20.7%	41.2%	89.71	1.48%	
REGN	REGENERON PHARMACEUTICALS	Health Care	Pharmaceuticals, Biotechnology & Life Sciences	Biotechnology	0.59	0.44%	3.81%	7%	15.94%	27.59%	29.82%	85.33	1.88%	

Now change the view to 'charts' again.

Right now what you are looking at are the top performers from the biotechnology industry, ranked by their 1-month performance.

Next, what you can do is find out which stocks from that same industry have not yet reached the highest 52-week price but where the stock price is near such a new high.

To do this, go to the 'Performance' section and select 'within 5% of 52-week high'.
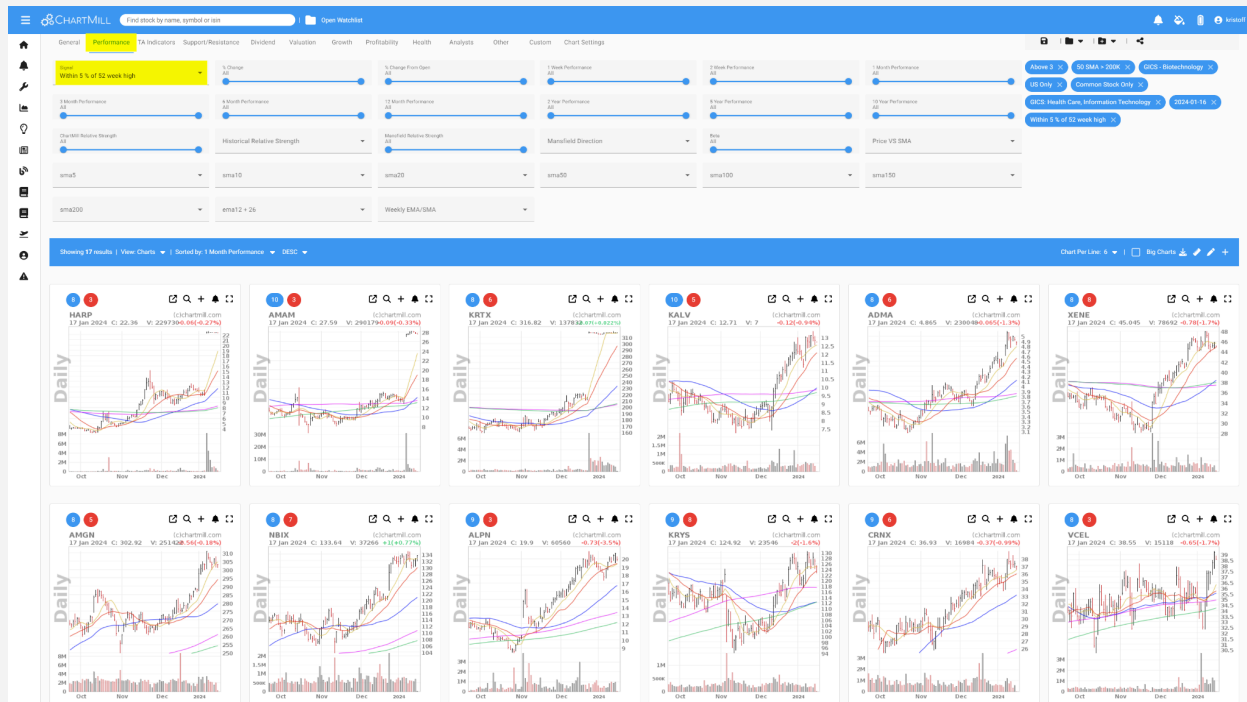
Alternatively, there is also the possibility of withholding only the stocks that have already reached a 52-week high in the past 5 days...

As you undoubtedly have noticed, chartmill provides a lot of opportunities to quickly and accurately compile broad lists of stocks that are worth following up further.

Keep in mind, however, that this will be a dynamic list. Markets can sometimes make strange moves in a short period of time. So it will be best to do this exercise at least once a week. Most traders therefore do this kind of broad market screening on weekends.

It sharpens their situational awareness while identifying the most promising setups.

Now It's Up to You!

Congratulations, you just received the last email of this class series!

Every day for the past 8 days we've tried to teach you something new about the many ways you can use our stock screener.

Have we covered everything the screener can do?

Obviously not!

However, based on what you've learned by now, you should be able to use the stock screener in such a way that your daily or weekly workflow in finding promising setups becomes much more efficient and user-friendly.

By using ChartMill routinely, you will uncover many new things. In that regard, be sure to check out our extensive documentation section where you can read a lot more about numerous topics. Not only about our screener by the way, but also on investing in general.

We strongly recommend the series on money and risk management which explains why both are so crucial if you want to be and remain structurally profitable in the long run!

What's next?

There are many ways to invest. Would you like to actively swing trade in the short to medium term? Or do you prefer the quiet, more passive approach in the long term?

Being successful in the stock market can be done in many different ways. Make sure you choose a way you feel comfortable with and that you can easily fit into your personal life.

Here are some links that can give you some inspiration if you are still not 100% sure about your approach.

- *Getting started With ChartMill For Day and Swing Traders*

- *Getting started With ChartMill For Swing and Position Traders in Growth Stocks*

- *Getting started With ChartMill For Long Term Investors (Value, Quality, Growth, Dividend,...)*

Follow us!

Be sure to follow us on our various social media channels and Youtube to be the first to know about new developments and updates or interesting setups for specific strategies.

- Our Twitter Account
- Private Twitter Account (Kristoff, Co-Founder ChartMill)
- Our Facebook Page
- Our Youtube Account

If you have any questions, don't hesitate to contact us!