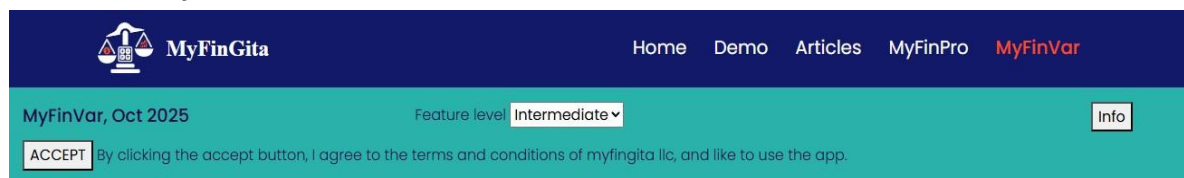


Quick user guide on how to use the portfolio app – myfingita.com/app/Myfinvar

1. Start the web app: Open the link myfingita.com/app/myfinvar in chrome or edge browser, you should see screenshot below



Click accept. App will load and is ready to try.

Change feature level if desired. You can also click 'info' button on top right to show quick user guide.

There are two sub apps within Myfinvar app, portfolio and filter. You can try them in any order.

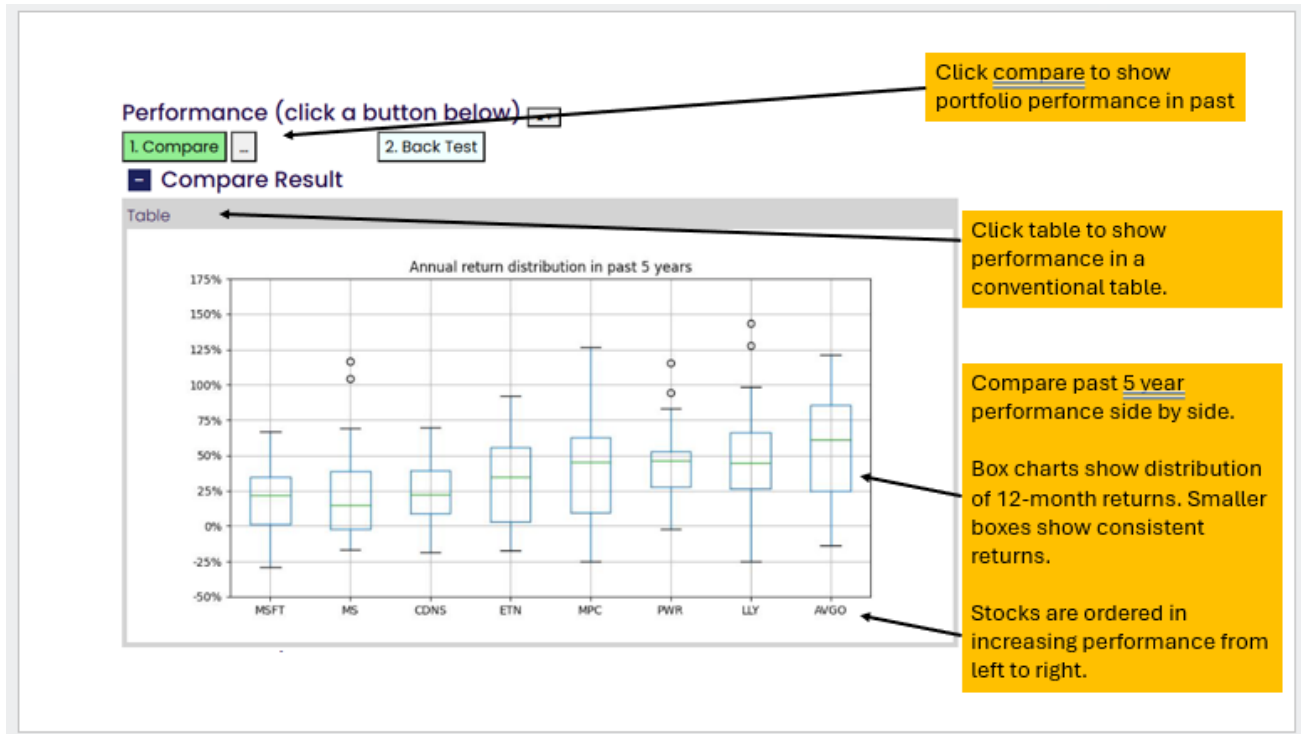
2. **Portfolio subapp** (myfingita.com/app/myfinvar/portfolio) : Use this sub app to study a stock portfolio of up to 10 stocks. Screenshot of app input on left shown.

- Select one of the example portfolios or create your own. Modify/update tickers to refine. Try our new 'similar' stocks recommendation to further tune the portfolio.

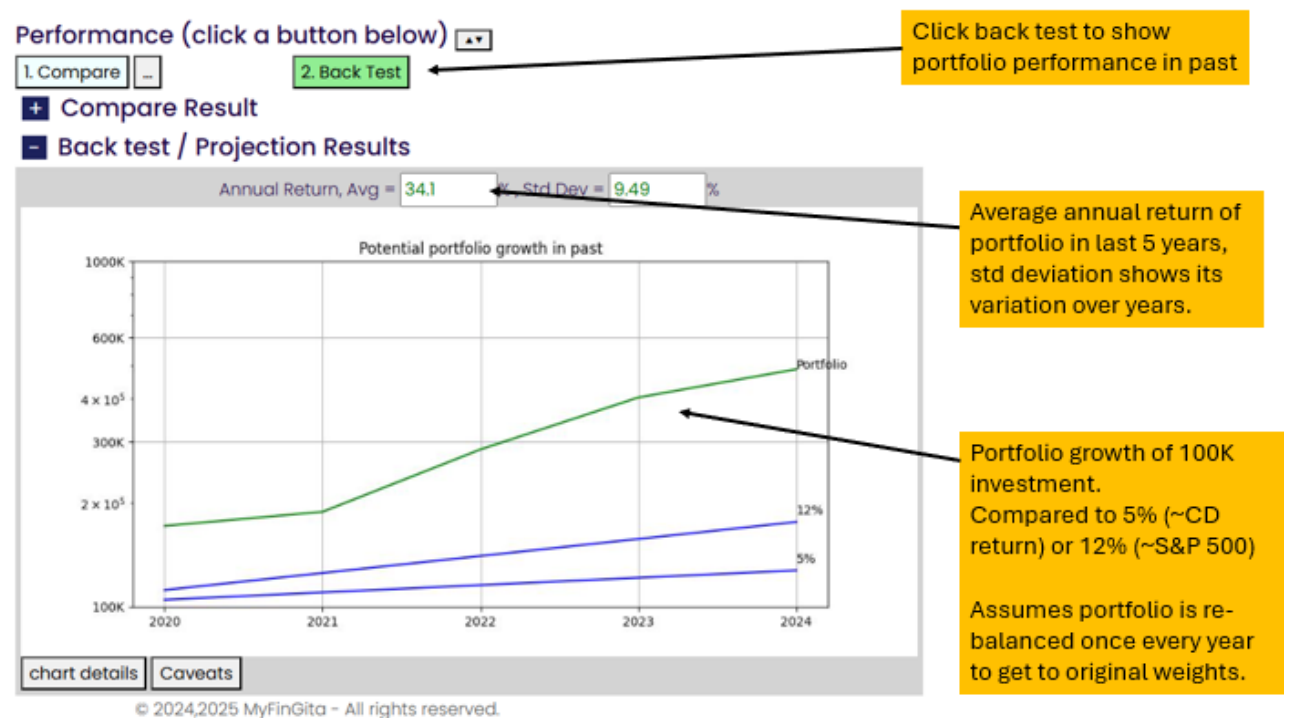
The screenshot shows the 'Portfolio' subapp interface. It has a title 'Portfolio' and a dropdown menu for 'Examples' with 'Stocks_moderate' selected. Below this is a table with columns 'Ticker' and 'Weight'. The 'Ticker' column has a 'Clear' button and a list of stock tickers (MSFT, LLY, MS, MPC, ETN, CDNS, PWR, AVGO) with a 'similar' button next to each. The 'Weight' column has a dropdown menu set to 'equal' and a list of weights (20%, 20%, 10%, 10%, 10%, 10%, 10%, 10%). Annotations with arrows point to various parts of the interface: 'Sample portfolios, select any for a quick start to try app. Modify, clear and enter your own tickers.' points to the 'Examples' dropdown; 'Set equal or custom weights to stocks, percent of portfolio position, roughly adds to 100.' points to the 'Weight' dropdown; 'NEW ! Click to show stocks like ticker, up to 5. Select from list to replace the ticker in portfolio. Allows you to create new portfolios from current one. (Note currently works only for tickers with yellow background).' points to the 'similar' button; and 'Can include cash or CD with a fixed return to portfolio' points to the bottom of the table.

Ticker	Weight
MSFT	20%
LLY	20%
MS	10%
MPC	10%
ETN	10%
CDNS	10%
PWR	10%
AVGO	10%

- Compare past performance of stocks in portfolio, side-by-side, by the box charts showing distribution of 12-month returns over last 5 years.



- Check how that portfolio performed over last 5 years with an initial investment of 100K. Portfolio growth is compared vs 5% or 12% fixed returns per year.



- Running app at advanced level, you can also project likely values of portfolio in future.
3. **Stock filter subapp** (myfingita.com/app/myfinvar/filter) : Use this sub app to filter to filter stocks, study their performance and to put them in a portfolio. It is relatively simple compared to others, but I have found quite effective. Filter is currently limited to about 500 SP 500 individual stocks and ETFs whose historical data has already been analyzed.

☐ Stock Filter

Stock Group Filter criteria Selected Stocks of *

Criteria	Ticker	Sector	Name	Return, Annual % (>=)	Dividend, Annual % (>=)	No of years beats spy (>=)
Select		All		20	1	4
Select	LLY	Health Care	Eli Lilly & Co	52.3	1.2	4

* Based on 5 years of historical data available for most S&P 500 stocks and selected benchmarks/ETFs.

- (if hidden) Unhide the filter sub app by clicking + button left of 'stock filter' title.
- Default criteria shown above is >20% return, >1% dividend and beats SPY all 4 years. Default filter condition selects 20 stocks out of 501 in database.
- Update the filter criteria if you like. You can also clear all filters or set them to default, by buttons at top middle.
- Filtered stock list updated immediately as filter criteria are changed and are shown by pull down list under Ticker column. The list is sorted in decreasing order of annual return. Total number of stocks in the list is shown at top right.
- Select any stock ticker from pull down list to look at its performance data.
- At advanced level, you can compare performance of two stocks from the list.
- If you like stock, click 'select' button left of ticker to add it to the portfolio (select button is not shown if you are running just the filter subapp without portfolio).