

FILTERS

STOCK EVALUATION TEMPLATE



This template is a helpful resource when used together with “**Filters: The Most Pragmatic Guide to Stock Market Investing.**” Structured as filters, each section of the guide walks you through fundamental analysis and stock valuation methods. It covers the entire process of finding and valuing the best stocks to buy for the long term. Use this template to get the most out of it.



Company Name:
Stock Ticker:
Industry:
Market Cap:

Date:
Note:

Screening

P/E:	<input type="text"/>	ROE:	<input type="text"/>	FCF/Sales:	<input type="text"/>	Payable Turnover:	<input type="text"/>
P/FCF:	<input type="text"/>	ROA:	<input type="text"/>	Asset Turnover:	<input type="text"/>	Interest Coverage:	<input type="text"/>
PEG:	<input type="text"/>	ROIC:	<input type="text"/>	Inventory Turnover:	<input type="text"/>	Current Ratio:	<input type="text"/>
P/B:	<input type="text"/>	RONTA:	<input type="text"/>	Receivable Turnover:	<input type="text"/>	D/E:	<input type="text"/>

Financial Statements

Pros:

Cons:

Other Notes:

Gross Profit Margin:
Operating Profit Margin:
Net Profit Margin:

Dividend Payout Ratio:
Equity Per Share:
Owner's Earnings Per Share:



Competitive Advantage

Threat of New Entrants:

Supplier Power:

Competitive Rivalry:

Buyer Power:

Threat of Substitutes:

Other Notes:

Management

Integrity in Leadership:

Communication with Shareholders:

Industry Experience and Competency:

Skin in the Game (Stock Ownership):

Compensation Structure:

Corporate Governance:

Company Culture:

Other Notes:



Capital Allocation

Opportunities:

Risks:

Other Notes:

Reinvestment Rate:

ROIIC:

Long-Term Growth Rate:

Valuation

Risk-Free Value:

Earnings Yield:

Graham Number:

Intrinsic Value - Scenario 1:

Notes:

Intrinsic Value - Scenario 2:

Notes:

Intrinsic Value - Scenario 3:

Notes: