



Information Guide - Analyst

We believe anybody who has spent enough time learning the stock market and created successful strategy should share their knowledge and in return get rewarded for their successful investment ideas. We have divided this guide in following parts to help you navigate faster

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Registration

Registration is very simple. Follow these steps to complete your registration for StockHoot

- Enter your name. Please enter your actual name if possible. This will allow investors to build trust.
- Enter your email address. We will send you verification email to confirm your email. All our communication is through email, so please make sure it's a valid email address.
- Enter password. Please make sure your password is at least 6 characters (alphabets & numbers)
- Click checkbox to agree to terms and conditions.
- If you have already sign up before as investor you don't need to create separate profile. You can use same account to start offering services to your investors
- If you have already sign up before, click on Sign In.
- If you forgot your password, click on forgot password and reset your password

Please sign up

Name

Email

Password

Confirm Password

I agree to [Terms and Conditions](#)

[Sign Up](#)

[Sign In](#) | [Forgot password](#)

Starting a New Service

We would like you to have a great start while offering service. We want to make sure that you provide enough information to your investors, so that they can subscribe to your service. We have created two level information that can help investor decide which services to subscribe. 1. Analyst Information 2. Service Information

Analyst information

Please fill up following information to make sure your investors have good knowledge about you. Better information you will provide, investors will have more comfort with your service offerings

- Add Profile picture - Adding profile picture helps investors to connect with you on personal level.
- Tell us something about yourself - Give information about your overall background. Your experience in investments. Example: your education background, why you like investments, your hobbies, your goals, your successes etc.
- Education - Pick highest level of education you had.
- Trading Experience - Pick years of investment experience you have
- Sectors - If you target any specific sectors for investments then pick up to two. If you follow all sectors please don't pick anything
- Trading philosophy - This actually helps investors to understand how to make investments. This is great section to exhibit your knowledge and discuss your overall strategy around financial success
- Links - If you have Twitter, LinkedIn, Facebook or any other profiles, please share those. Investors can definitely learn more about you, if required

Service Information

Investors would like to know about your service before subscribing to it. It is very important to provide specific information for the service. Please fill up following information

- Service Name - Naming a service is very important. It will help investors to visualize what you have to offer. We recommend that name based on your strategy. Examples : Daily Trends, Long Term growth stocks etc.
- Trading Strategy - If you are offering service that targets some strategy please pick up to two strategies. If you do not have any specific strategy please leave it blank
- Sectors - If you are offering service that targets some sectors please pick up to two strategies. If you do not have any specific sectors please leave it blank
- Description - Here you can add more details about your service. It is great place to add your selling points. Why you are offering this service and how it is going to help investors
- Subscription - There are two ways to offer subscriptions
 - a. Free - This is great starting point. When you start your service it is highly recommended that you start as free, build your pool of subscribers before offering paid subscription. Investors will not enter any credit card information. In future you can convert your service to be paid service, in that case investors will be prompted to enter their credit card information to continue to use your service
 - b. Paid - If you already have great followers on Twitter, LinkedIn or you have already received great response from free subscription, you can make your subscription paid. Investors will enter credit card information to use your service. We will automatically charge them on monthly or yearly based on their subscription. Please fill up following information
 - Trial Period - You can give trial period to users to get used to with your service. They still need to enter their credit card information, but will be charged only after their subscription period is over
 - Monthly Plan - Please enter what you want to charge your investors on monthly basis. When you will enter information it will tell you how much will be transaction cost and also service charge from StockHoot. If investor cancel subscription before their end date of monthly subscription, their service will remain active till end date, but they will not get refund.
 - Yearly Plan - Please enter what you want to charge your investors on yearly basis. When somebody subscribes for yearly plan, it is a good practice to give them either one or two months free. You want to create that incentive for investors to pay for 1 year in advance. When you will enter information it will tell you how much will be transaction cost and also service charge from StockHoot. If investor cancel subscription before their end date of yearly subscription, their service will remain active till end date, but they will not get refund.

Managing Service

We have many analysts on our website and to make sure you have good subscriber based, its important to actively manage your services.

Manage Positions

Based on your investment strategy, we recommend that you actively manage your positions. Managing positions are divided into three parts

1. **Recommend new Investment Ideas** - All analysts get \$100,000 worth of portfolio to manage. You have to make sure that you recommend new positions based on your investment strategy. This is very important since investors subscribed to your service to get these recommendations. Investors will receive email/notification once you have filled up following information
 - a. Search Symbol - You can search any stock ticker. We are not allowing penny stocks and mutual funds at this time. We only allow recommendation of investments for stocks and ETFs listed on NYSE, NASDAQ and ASE
 - b. Quantity - You want to recommend position based on your allocation. Please enter quantity based on your percentage allocation of portfolio
 - c. Time Horizon - It is very useful for investors to know when you are expecting that stock to reach the target price. Your position will automatically close on that day, if target price is not reached, stop loss is not met or you have closed the position
 - d. Target Price - Please put target price based on your research. Once your recommendation will hit target price in your recommended time horizon, it will automatically close the position and mark that recommendation as "Success".
 - e. Stop Loss - Add stop loss to your position. If stock price will go below or equal to stop loss, your position will automatically close and it will be marked as "Fail"
 - f. Add Photo - You can also add chart etc to showcase why you recommending this position. Investors will see this photo as part of recommendation
 - g. Description - Please write comments on why you are recommending this investment. More information you can provide its better for investors, since they do not need to do additional research
2. **Manage Open Positions** - Recommending new investment idea is a great starting point, but you also need to actively look into your open positions to see if your recommendation is still holding. Many times after your recommendation, stock market may take different directions and you want to take your profit or loss early before it hits its target price or stop loss respectively. You can check charts by going to **Dashboard > Your Service > Open Positions**

Broadcast Messages - Broadcasting message to all subscribers helps to keep them engaged. We recommend that you should broadcast messages on regular basis to show your subscribers that you actively manage your services. It is also great way to share some quick updates and make them aware of market trends. Example, Interest rate is going higher or Oil prices are spiking. You can broadcast a message by going to **Dashboard > Your Service > Messages**

Charts - We track all your investment ideas and track performance of those ideas. It is good to see how your overall portfolio is growing based on recommendation provided. It also tell you % allocation in each idea. You can check charts by going to **Dashboard > Your Service > Charts**

Manage Subscribers

Once you start offering and managing your service, it's equally important to manage your subscribers. There are two major components to manage your subscribers

Getting Subscribers

StockHoot provides medium for people to search and pick right analysts and services. It also provides platform for analysts to add information required for investors to join the subscription. Best practices to get subscribers are

- **Social Media** - You can share your profile link on social media sites and expose your services to already people following you. To share link to go **Dashboard > Your Service > Click on social links**
- **Managing Positions** - Your selling point is your investment ideas, hence you should manage it to showcase your performance matrix to potential subscribers. (% YTD Return [% growth of portfolio since beginning of the year], % Success Rate [Successful Investment idea of all closed ideas], Average % Return [Average return on each investment idea])
- **Free/Trial Subscription** - Many times people would like to use the service and get engaged before paying for that service. StockHoot provides two ways to attract subscribers
 - **Free** - Keep your subscription free for first 2-3 months to build your portfolio and performance and then change it to paid subscription. Also investors do not enter their credit card details hence they feel more comfortable to try your service
 - **Trial Period** - Trial period is another great way for anybody to get started too. You can allow users to use your service for some period of time before they actually pay for your service.

Maintaining Subscribers

You can get many subscribers through different ways of engagement, but for your long term success its very important to maintain those who subscribed to your service. StockHoot provides following best practices to maintain your subscribers

- **Managing Positions** - Your selling point is your investment ideas, hence you should manage it to showcase your performance matrix to potential subscribers. (% YTD Return [% growth of portfolio since beginning of the year], % Success Rate [Successful Investment idea of all closed ideas], Average % Return [Average return on each investment idea])
- **Chats** - Investors have opportunity to connect with you to ask questions about recommendation. This is great way to connect with subscribers/Investors and build long term relationships.We will prompt you if there is any open questions from your subscriber

through notifications and emails. You can go to Chat from **Top Menu > Chat**. You can also start chat with any subscriber by going to **Dashboard > Your Service > Subscribers > Chat Now**

- **Broadcast Messages** - Broadcasting message to all subscribers helps to keep them engaged. We recommend that you should broadcast messages on regular basis to show your subscribers that you actively manage your services. It is also great way to share some quick updates and make them aware of market trends. Example, Interest rate is going higher or Oil prices are spiking. You can broadcast a message by going to **Dashboard > Your Service > Messages**
- **Inactive Subscribers** - Investors may cancel subscription. It is great habit to get their feedback when they cancel it. It helps you to understand and improve your service. You can use chat feature to get their feedback. You can start chat with any subscriber by going to **Dashboard > Your Service > Subscribers > Chat Now**

Account Management

Managing Payments

StockHoot completely manages payments for you. You will receive email and notification when you will receive payment from your subscribers. You can check payments that you have received by going to **Dashboard > Your Service > Payments**. We will deposit money in your account.

Withdrawal

We will keep on depositing subscription fee in your account as we receive payment from your subscribers. We will deduct transaction cost and StockHoot fees and deposit remaining amount in your account. Withdrawing from your account is very simple. Go to **My Account** in sub menu under your name in top bar. We allow minimum of \$50, hence once your account has more than \$50 deposited, you will see **Withdraw** button. Click on withdraw button and enter your mailing address. We will send your check of requested amount. You can check status of your withdrawal request in **My Account**