

MARCS TEN

Stock Mixology

Comparison Tool Guide

Comparison Tool Guide Overview

1. Subscribing to a screener
2. Rebalancing: Comparing new screeners to previous ones
3. Accessing archived screener results

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1) Subscribing to a new Screener

JOEL GREENBLATT
The Magic Formula
Updated: 1:30

[Sign Up Now](#) [Log In](#)



Results

10/09/2024

[Subscribe](#)

Ticker	Name	Price	Sector	Industry
NATH	Nathan's Famous, Inc.	\$80.35	CONSUMERSVCE	HOSPITALITY
IDT	IDT Corp.	\$38.16	TELECOM	TELECOMWIRE
FTLF	FitLife Brands, Inc.	\$32.74	NONCYCLICAL	PERSONALCARERETAIL
PNRG	PrimeEnergy Resources Corp.	\$151.20	ENERGY	FOSSILFUEL

Begin by clicking
'Subscribe' on any
screener page.

You must have a Stock
Mixology account to
subscribe to a screener.

JOEL GREEN

The Magic Formula

Sign Up Now

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Subscribed!

Thank you for subscribing to this screener. We have sent an email confirmation to you.

After the default rebalance period has occurred (90 days), you should receive a follow-up reminder to compare today's screener with the new screener results.



[Go to main page](#)

Subscribed screener?

Compare

Results

10/12/2024

Ticker	Name	Price	Sector	Industry
NATH	Nathan's Famous, Inc.	\$80.35	CONSUMERSVCE	HOSPITALITY
IDT	IDT Corp.	\$38.16	TELECOM	TELECOMWIRE
FTLF	FitLife Brands, Inc.	\$32.74	NONCYCLICAL	PERSONALCARE RETAIL
PNRG	PrimeEnergy Resources Corp.	\$151.20	ENERGY	FOSSILFUEL

You are now subscribed as of that day's date.

You may export a reminder to your personal calendar by clicking the available **calendar icons**.

The calendar reminder defaults to 90 days (if using one rebalance per quarter) in most situations. This prompts you to log back in to Stock Mixology next quarter to view the new list of stocks for that particular screener.

You will also receive a confirmation email.

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**2) Rebalancing: Comparing New Screeners to
Previous Ones**

Sign Up Now Log In

Results

10/12/2024

Do you want to compare with your most recently archived screener? [Compare](#)

Ticker	Name	Price	Sector	Industry
NATH	Nathan's Famous, Inc.	\$80.35	CONSUMERSVCE	HOSPITALITY
IDT	IDT Corp.	\$38.16	TELECOM	TELECOMWIRE
FTLF	FitLife Brands, Inc.	\$32.74	NONCYCLICAL	PERSONALCARE RETAIL
PNRG	PrimeEnergy Resources Corp.	\$151.20	ENERGY	FOSSILFUEL
IBEX	IBEX Ltd.	\$19.29	BIZSVCE	PROSVCE
MPX	Marine Products Corp.	\$9.47	CYCLICALS	LEISURE
CIX	CompX International, Inc.	\$29.62	MATERIALS	MATCONSTR
PMTS	CPI Card Group, Inc.	\$23.62	BIZSVCE	MKTNGPRINTNG
NEU	NewMarket Corp.	\$529.29	MATERIALS	CHEMSPECIAL
ULH	Universal Logistics Holdings, Inc.	\$45.62	INDUSTRIAL	TRAINTRUCK

[Unsubscribe](#)

After hitting 'Subscribe', Stock Mixology assumes that you have taken the buying/selling actions in your own personal brokerage account to follow along with the screener.

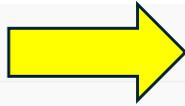
After your quarterly (by default) rebalance period, your calendar reminder should prompt you to return to Stock Mixology.

Head back to the screener page and initiate the **Comparison Tool** by clicking the 'Compare' button.

If at any point you would like to **unsubscribe** from the screener, the option is available at the bottom.

Results

10/12/2024



Add new screener to my archive

Exit Comparison

Ticker	Name	Price	Sector	Industry	Action
NATH	Nathan's Famous, Inc.	\$84.06 +3.71	CONSUMERSVCE	HOSPITALITY	Hold
FTLF	FitLife Brands, Inc.	\$31.98 -0.76	NONCYCLICAL	PERSONALCARE RETAIL	Hold
IDT	IDT Corp.	\$48.01 +9.85	TELECOM	TELECOM WIRE	Hold
ROCK	Gibraltar Industries, Inc.	\$67.13	MATERIALS	MATCONSTR	Add
HCKT	The Hackett Group, Inc.	\$25.69	BIZSVCE	PROSVCE	Add
PNRG	PrimeEnergy Resources Corp.	\$160.17 +8.97	ENERGY	FOSSILFUEL	Hold
IBEX	IBEX Ltd.	\$19.32 +0.03	BIZSVCE	PROSVCE	Hold
PMTS	CPI Card Group, Inc.	\$23.89 +0.27	BIZSVCE	MKTNGPRINTING	Hold
BRC	Brady Corp.	\$74.97	BIZSVCE	MKTNGPRINTING	Add
NEU	NewMarket Corp.	\$525.23 -4.06	MATERIALS	CHEMSPECIAL	Hold
MPX	Marine Products Corp.	\$9.47	CYCLICALS	LEISURE	Remove
CIX	CompX International, Inc.	\$29.62	MATERIALS	MATCONSTR	Remove



Upon entering the **comparison view**, Stock Mixology will compare our most recent screener results with the screener results from either your original subscription or last rebalance.

Under the **Action** column, there are three possible options...

- **Add**: that stock has been added to the screener results since last time
- **Hold**: that stock is still there, as it was for you last time
- **Remove**: that stock is no longer in the screener results

The '**Add new screener to my archive**' function is how your personalized screener gets saved to your profile.

- **IMPORTANT**: This button must be clicked during each rebalance to properly archive to your profile for future comparisons.

Piggybacking off the Executives; Minimizing Risk

Updated: 10/12/2024

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Results

10/12/2024

Ticker	Name	Price	Industry	Sub-Industry	Action
KMB	Kimberly-Clark Co.				Hold
GIS	General Mills, Inc.				Hold
GILD	Gilead Sciences, Inc.				Hold
T	AT&T, Inc.	\$21.37	TELECOM	TELECOMWIRE	Hold
CL	Colgate-Palmolive Co.	\$100.10	NONCYCLICAL	PERSONALCAREPRODUCT	Hold

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HOW IT WORKS

The screener results do not differ from your most currently archived screener

[Go to main page](#)

Archive Exit Comparison

If you are worried about hitting 'Add new screener to my archive' twice on accident, fear not.

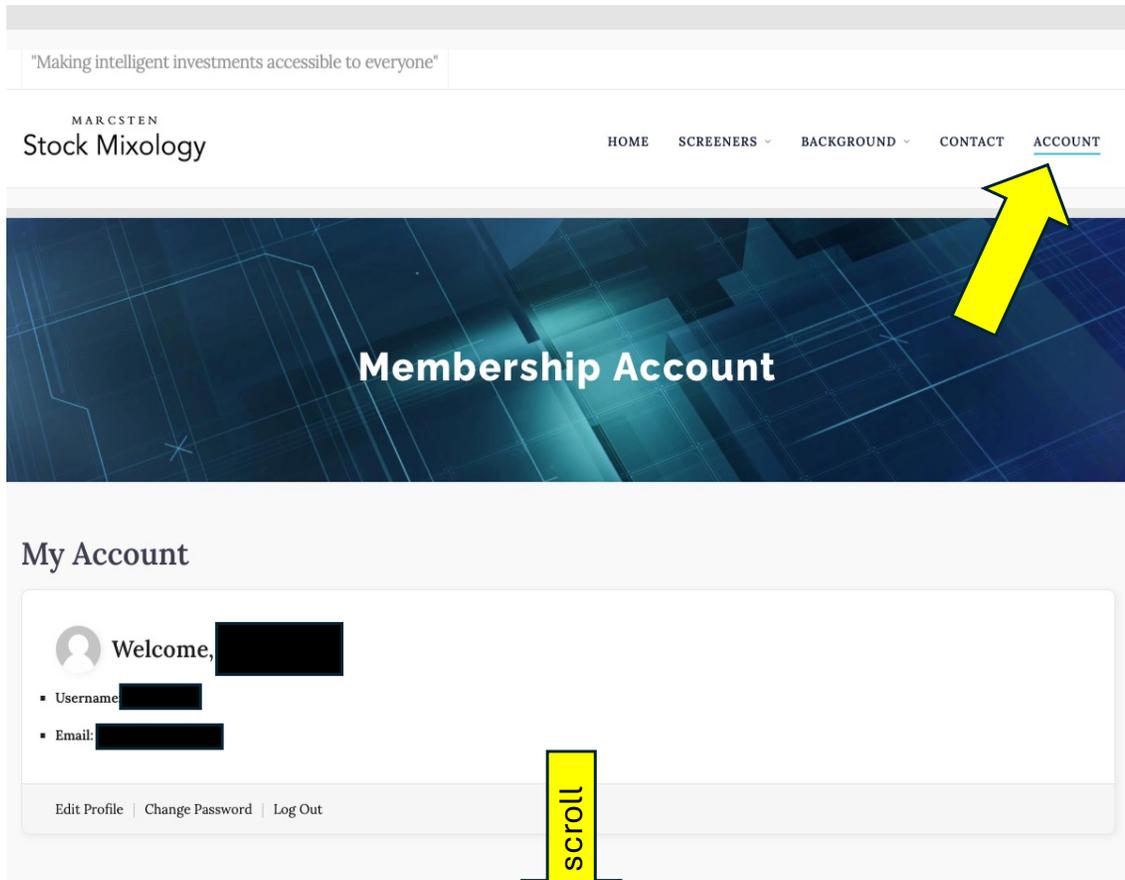
If the stocks are the exact same (including price), Stock Mixology will not redundantly store the duplicate screener.

This keeps your archived screeners profile page clean.

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3) Accessing archived screener results



Click '**Account**' in the top-right of the page to access your profile.

Here you can see various information about your account. To view the screeners you are subscribed to, scroll down to the bottom of the page.

My Screeners

Name	Status	Start	Rebalance Date	Action
Joseph Piotroski	Subscribed	09.30.2024	09.30.2024	View all Compare ⋮
James O'Shaughnessy	Unsubscribed	-	-	View all Subscribe ⋮
Marcsten Large Cap	Subscribed	10.07.2024	10.07.2024	View all Compare ⋮
Joel Greenblatt	Subscribed	10.12.2024	10.12.2024	View all Compare ⋮



→ After all, compounding wealth is the eight wonder of the world.

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Under **My Screeners**, you will see all screeners you are subscribed to. There are five columns with information about each subscription.

- **Name:** screener name

- **Status:** subscription status

- **Start:** when you originally started your subscription to that screener

- **Rebalance Date:** when you most recently rebalanced, as determined by when you clicked '[Add new screener to my archive](#)' on the comparison page.

- **Action:** You may re-subscribe or enter the comparison feature from here.

Also, '[View All](#)' will take you to all previously archived screener results.

That is where we will head next...

(**NOTE:** due to demonstration purposes, our Start and Rebalance Dates are the same. Yours, by default, will differ by 90 days, then 180, 270, etc. for quarterly rebalancing)

Achive: Marcsten Large Cap

Compare with most current screener

10/12/2024

Ticker	Name	Price	Sector	Industry
KMB	Kimberly-Clark Corp.	\$142.25	NONCYCLICAL	PERSONALCAREPRODUCT
GIS	General Mills, Inc.	\$70.81	NONCYCLICAL	FOODDRINKMFR
GILD	Gilead Sciences, Inc.	\$84.95	HEALTHCARE	BIOPHARMANONSYS
T	AT&T, Inc.	\$21.37	TELECOM	TELECOMWIRE
CL	Colgate-Palmolive Co.	\$100.10	NONCYCLICAL	PERSONALCAREPRODUCT

10/07/2024

Ticker	Name	Price	Sector	Industry
KMB	Kimberly-Clark Corp.	\$140.89	NONCYCLICAL	PERSONALCAREPRODUCT
GIS	General Mills, Inc.	\$73.61	NONCYCLICAL	FOODDRINKMFR
GILD	Gilead Sciences, Inc.	\$84.59	HEALTHCARE	BIOPHARMANONSYS
T	AT&T, Inc.	\$21.91	TELECOM	TELECOMWIRE
CL	Colgate-Palmolive Co.	\$99.04	NONCYCLICAL	PERSONALCAREPRODUCT

→ After all, compounding wealth is the eight wonder of the world.

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Here is an example of how all your archived screener results will store to your profile. This helps to document your trades.

In this example, the stocks appear the same due to the five-day rebalance period (10/7 then 10/12), but the updated prices were nonetheless archived.

Remember, Stock Mixology defaults to 90-day rebalance periods.

You may also return to the **Comparison Tool** feature from this page.

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Please reach out to provide feedback or ask questions:

Contact Form on website

or

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frank@marcsten.com