

Comparison of NAIC Investing Software

	NAIC Take Stock	NAIC Classic Plus	NAIC Investor's Toolkit	NAIC Stock Analyst
<b>Best Suited For The...</b>	<b>...beginning investor</b> new to or intimidated by NAIC's methods.	<b>...inquisitive newbie</b> ready to learn & apply NAIC's methods.	<b>...intermediate investor</b> already acquainted with NAIC methods.	<b>...advanced investor</b> fluent in NAIC methods & ready for more.
<b>Strengths</b>	Simplicity, convenience, all-in-one package.	Detailed NAIC education, grows with user.	Most widely used, all around top performer.	Power, graphics, customization, flexibility, extras.
<b>Learning tools</b>				
Tutorial	✓	✓		
Task Alerts			✓	
Stock Wizard	✓	✓		
NAIC Concepts Education	✓			
Prompt Window	✓	✓	✓	
Judgment Audit			✓	
Context-sensitive help	✓	✓	✓	✓
<b>Company Analysis</b>				
Default judgment	✓			
<i>Summaries</i>	✓			
Reasons to buy	✓			
Items to check	✓			
Quality, mood, risk indicators	✓			
"Automatic analysis"	✓			
Judgment wizard	✓			
Stock Checklist (SCL)		✓	✓	✓
<i>Stock Comparison Guide (SSG)</i>		✓	✓	✓
SCG Report		✓	✓	✓
Criteria Weighting			✓	
SCG Graphics			✓	✓
<i>Stock Selection Guide (SSG)</i>		✓	✓	✓
SSG Graph (Page 1)	✓	✓	✓	✓
SSG Analysis (Page 2)	✓	✓	✓	✓
SSG Report (Pages 3-4)		✓	✓	✓
<i>Balance Sheet</i>			✓	✓
Report				✓
Analysis				✓
<i>Advanced graphics capabilities</i>			✓	✓
Semi-log trend report				✓
Growth rate trends			✓	
Drag & drop data positioning			✓	
Drag & drop trend lines				✓
Multi-window data view				✓
<b>Portfolio Management</b>				
<i>Portfolio Evaluation &amp; Review Technique (PERT)</i>			✓	✓
PERT-A		✓	✓	✓
PERT-B		✓	✓	✓
PERT Report		✓	✓	✓
PERT Trend Report			✓	
PERT graphical extras			✓	✓
<i>Portfolio Management Guide (PMG)</i>			✓	✓
PMG Report		✓	✓	✓
PMG Graphics		✓	✓	✓
<i>Portfolios</i>			✓	✓
Multiple Portfolios			✓	✓
Portfolio Report Card			✓	
Portfolio Alerts			✓	✓
Retirement planner				✓
Foreign currency support				✓
<i>Challenges</i>			✓	✓
Challenge Tree				✓
Smart Challenge			✓	
Cost-to-switch			✓	✓
Defense/offense procedures			✓	
Aggregate performance displayed			✓	
Diversification analysis			✓	✓
<b>Internet &amp; Data</b>				
Internet connectivity	✓	✓	✓	✓
Full integration with OPS data		✓	✓	✓
Data subscription included	✓			
Data exchange between users		✓	✓	✓
<b>NAIC Member Pricing</b>				
New User	\$99*	79°	\$169°	199°
Upgrade	\$49 from Take Stock 4	\$39 from NAIC Classic	\$89 from Toolkit 4 Pro	\$99 from Classic Plus, SA+ or Toolkit Pro

\* Includes software, updates, stock data, and support for 1 yr. Annual renewal is \$49.

° Annual support & maintenance agreement is \$29, including Complete Roster of Quality Companies.