USING GOOGLE FINANCE FUNCTIONS

DC Chapter of BetterInvesting

October 8, 2018

Google

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Slides

Forms

For Work Help

Sage Create complex spreadsheets

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WHY GOOGLE SHEETS?

- Available on any platform with a web browser
- Google Finance provides real time financial data at no cost
- Can link individual sheets together to build complex spreadsheets
- Spreadsheet can be shared (view only or editable)
- If you know how to use Excel, you can use Google Sheets
- Provides bells and whistles like graphs and condition formatting using color

STOCK FUNCTIONS

- Name
- Price
- Opening Price
- Daily High
- Daily Low
- Volume
- Market Cap
- Shares Outstanding

- P/E
- EPS
- 52-week High
- 52-week Low
- Beta
- \$ Change Today
- % Change Today

- "price" Realtime price quote, delayed by up to 20 minutes.
- "priceopen" The price as of market open.
- "high" The current day's high price.
- "low" The current day's low price.
- "volume" The current day's trading volume.
- "marketcap" The market capitalization of the stock.
- "tradetime" The time of the last trade.
- "datadelay" How far delayed the realtime data is.
- "volumeavg" The average daily trading volume.

- "pe" The price/earnings ratio.
- "eps" The earnings per share.
- "high52" The 52-week high price.
- "low52" The 52-week low price.
- "change" The price change since the previous trading day's close.
- "beta" The beta value.
- "changepct" The percentage change in price since the previous trading day's close.
- "closeyest" The previous day's closing price.
- "shares" The number of outstanding shares.

MUTUAL FUND FUNCTIONS

- Name
- Price
- Date of Last Price
- \$ Change Today
- % Change Today
- YTD Return
- Expense Ratio
- Distribution yield

- I-wk Return
- 4-wk Return
- 13-wk Return
- 52-wk Return
- 156-wk Return
- 260-wk Return
- Morningstar Rating

- "closeyest" The previous day's closing price.
- "date" The date at which the net asset value was reported.
- "returnytd" The year-to-date return.
- "netassets" The net assets.
- "change" The change in the most recently reported net asset value and the one immediately prior.
- "changepct" The percentage change in the net asset value.
- "yieldpct" The distribution yield, the sum of the prior 12 months' income distributions (stock dividends and fixed income interest payments) and net asset value gains divided by the previous month's net asset value number.

- "returnday" One-day total return.
- "return I" One-week total return.
- "return4" Four-week total return.
- "return I 3" Thirteen-week total return.
- "return52" Fifty-two-week (annual) total return.
- "return156" 156-week (3-year) total return.
- "return260" 260-week (5-year) total return.
- "returnday" One-day total return.
- "morningstarrating" The Morningstar star rating.
- **"expenseratio"** The fund's expense ratio.

HISTORICAL PRICE DATA

- "open" The opening price for the specified date(s).
- "close" The closing price for the specified date(s).
- "high" The high price for the specified date(s).
- "low" The low price for the specified date(s).
- "volume" The volume for the specified date(s).
- "all" All of the above.

SYNTAX

- GOOGLEFINANCE(ticker, [attribute], [start_date], [end_date|num_days], [interval])
 - ticker The ticker symbol for the security to consider.
 - Need at least a ticker and an attribute
- Examples:
 - =GOOGLEFINANCE("GOOG", "price)
 - =GOOGLEFINANCE(A2,A3)
 - =GOOGLEFINANCE("GOOG", "price", DATE(2017,1,1), DATE(2017,12,31), "DAILY")
 - =GOOGLEFINANCE("GOOG","price",TODAY()-30,TODAY())

	Α	В	с	D	E	F	G	н	1	J	к	L	м	N	0 4	►R	S	т	U	v	w
1			•	•															•		
2		Security	Ticker	Shares	Cur Price	Market Value	% Port.	Daily \$ Change	Daily % Change	1-Wk % Change	YTD % Change	1-Yr % Change	3-Yr % Change	Fm 52w Low	60 day Trend	Cur P/E	Market Cap \$	Market Cap Size	Cost	Port. Gain \$	Port. Gain %
3																					
4		Equities																			
5	1	Air Lease Corp	AL	313.273	45.15	14,144	5.5%	(191.10)	-1.33%	-0.5%	-6.0%	4.6%	10.4%	46.8%	~~~~	6	4,699	Medium	12,305	1,839	14.9%
6	2	Amgen, Inc.	AMGN	72.328	204.02	14,756	5.8%	39.78	0.27%	-1.4%	15.3%	10.0%	11.3%	86.8%		57	132,057	Large	10,775	3,981	36.9%
7	3	Apple Inc.	AAPL	72.078	224.29	16,166	6.3%	(266.69)	-1.62%	-1.3%	30.2%	43.9%	26.5%	89.0%	~~~~	20	1,083,30	Large	4,318	11,848	274.4%
8	4	Berkshire Hathaway Inc. Class B	BRK.B	99.236	219.46	21,778	8.5%	61.53	0.28%	2.2%	11.3%	17.0%	18.3%	91.7%	\sim	0	542,564	Large	9,554	12,224	127.9%
9	5	Biogen Inc	BIIB	37.728	342.08	12,906	5.1%	(38.48)	-0.30%	-3.0%	2.4%	4.0%	10.0%	66.6%	$\sim\sim\sim\sim$	24	68,910	Large	10,297	2,609	25.3%
10	6	Celgene Corporation	CELG	137.898	87.27	12,034	4.7%	(183.40)	-1.50%	-2.9%	-17.8%	-37.3%	-9.3%	19.1%	m	24	61,382	Large	17,980	(5,945)	-33.1%
11	7	Cognizant Technology Solutions C	CTSH	153.902	75.21	11,575	4.5%	(136.97)	-1.17%	-2.3%	6.0%	2.1%	4.5%	35.8%	m	30	43,639	Large	7,881	3,694	46.9%
12	8	CVS Health Corp	CVS	178.627	78.67	14,053	5.5%	(119.68)	-0.84%	-1.0%	7.0%	5.9%	-8.0%	78.1%		27	80,091	Large	14,587	(535)	-3.7%
13	9	Gentex Corporation	GNTX	418.209	20.35	8,511	3.3%	(221.65)	-2.54%	-4.1%	-3.7%	1.0%	8.8%	26.7%	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	13	5,472	Large	7,559	951	12.6%
14	10	EPAM Systems Inc	EPAM	97.547	132.62	12,937	5.1%	(36.09)	-0.28%	-3.9%	22.3%	47.7%	17.9%	78.9%		60	7,133	Large	9,197	3,740	40.7%
15	11	Alphabet Inc Class A	GOOGL	6.393	1,167.83	7,466	2.9%	(59.07)	-0.78%	-3.4%	8.8%	17.7%	20.3%	61.5%	~~~~~	51	809,351	Large	1,726	5,740	332.5%
16	12	Microsoft Corporation	MSFT	135.169	112.13	15,156	5.9%	(89.21)	-0.59%	-3.0%	30.5%	47.0%	33.8%	90.2%	~~~~	53	859,837	Large	4,074	11,082	272.0%
17	13	Signature Bank	SBNY	76.674	114.71	8,795	3.4%	(77.44)	-0.87%	1.1%	-16.9%	-7.5%	-6.6%	11.0%	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	15	6,350	Large	9,004	(209)	-2.3%
18	14	Simulations Plus, Inc.	SLP	890.063	20.00	17,801	7.0%	(258.12)	-1.43%	0.4%	27.8%	19.0%	28.9%	59.3%		41	347	Small	8,438	9,363	111.0%
19	15	Supernus Pharmaceuticals Inc	<u>SUPN</u>	159.745	48.01	7,669	3.0%	9.58	0.13%	-2.2%	18.7%	16.7%	49.1%	52.6%	\sim	30	2,507	Medium	7,500	169	2.3%
20	16	Skyworks Solutions Inc	<u>SWKS</u>	112.230	87.55	9,826	3.8%	(392.81)	-3.84%	-4.3%	-11.1%	-16.4%	1.5%	13.0%	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	18	15,670	Large	9,336	489	5.2%
21	17	Thor Industries, Inc.	THO	115.622	81.38	9,409	3.7%	(101.75)	-1.07%	-1.4%	-47.6%	-37.0%	14.4%	1.2%		10	4,288	Medium	11,304	(1,895)	-16.8%
22						214,984	84.2%									Avg:			155,836	59,148	
23																					
24		Index Funds																			
25	1	PowerShares Dynamic Biotech & C	PBE	181.553	56.15	10,194	4.0%	(45.39)	-0.4%	-4.4%	16.2%	12.1%	6.2%	75.1%	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		241		6,226	3,968	63.7%
26	2	Vanguard Small-Cap ETF	<u>VB</u>	72.338	157.19	11,371	4.5%	(94.04)	-0.8%	-2.3%	5.5%	10.2%	11.6%	68.7%			24,221		5,651	5,719	101.2%

QUESTIONS?