

Stock Market Formulas

ROI - Return on Investment

Formula

$$\text{ROI (\%)} = \frac{\text{Net Profit}}{\text{Total Investment}} \times 100$$

ROI (%) → Return on Investment



ROE - Return on Equity

Formula

$$\text{ROE (\%)} = \frac{\text{Net Profit}}{\text{Shareholder's Equity}} \times 100$$

ROE → Return on Equity



ROR - Rate of Return

Formula

$$\text{ROR (\%)} = \frac{(\text{Final Share Value} - \text{Initial Share Value})}{\text{Initial Share Value}} \times 100$$

ROR (%) → Rate of Return



EPS - Earning Per Share

Formula

$$\text{EPS} = \frac{(\text{Net Income} - \text{Preferred Dividends})}{\text{Total Outstanding Shares}}$$

EPS → Earning per Shares

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YTC - Yield to Call

Formula

$$\text{YTC}_{\text{approximate}} = \frac{C + (FP - CP)/n}{(FP + CP)/2}$$

YTC → Yield to Call

C → coupon payment or annual fixed interest

FP → face value of the bond

CP → call price of bond

n → number of years to call

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YTM - Yield to Maturity

Formula

$$YTM_{\text{approximate}} = \frac{C + (FP - MP)/n}{(FP + MP)/2}$$

YTM → Yield to Maturity

C → coupon payment or annual fixed interest

FP → face value of the bond

MP → market price of bond

n → number of years to maturity

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DY - Dividend Yield

Formula

$$\text{Dividend Yield} = \frac{\text{Annual Dividend per Share}}{\text{Price per Share}} \times 100$$

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DPR - Dividend Payout Ratio

Formula

$$DPR = \frac{\text{Total Amount Paid to Shareholders}}{\text{Net Income}}$$

DPR → Dividend Payout Ratio

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NPM - Net Profit Margin

Formula

$$\text{Net Profit Margin} = \frac{\text{Net Income}}{\text{Revenue}} \times 100$$

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Stock Profit

Formula

$$\text{Stock Profit (\%)} = \frac{((\text{SSP} - \text{SC}) - (\text{SPP} + \text{BC}))}{\text{SPP} + \text{BC}} \times 100$$

SPP → stock purchased price

BC → buying commision

SSP → stock selling price

SC → selling commision

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P/E - Price To Earning Ratio

Formula

$$\text{P/E Ratio} = \frac{\text{Market Price per Share}}{\text{Earnings per Share}}$$

P/E Ratio → Price to Earnings Ratio

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P/B - Price to Book Ratio

Formula

$$\text{P/B Ratio} = \frac{\text{Market Price per Share}}{\text{Book Value per Share}}$$

P/B Ratio → Price to Book Ratio

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Break Even Ratio

Formula

$$\text{Break Even Ratio} = \frac{(\text{Debt Service} + \text{Operating Expenses})}{\text{Gross Operating Income}}$$

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Loan to Value

Formula

$$\text{LTV (\%)} = \frac{\text{Loan Amount}}{\text{Asset Value}} \times 100$$

LTV → Loan to Value

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