

Tutorial to Easily Auto Track Insider Transactions

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Track Insider Transactions

Is There a Way to Track Insider Transactions

Here's a quick tutorial on how to set up an RSS feed for your company's insider transactions and [track insider transactions](#).

This is something that is extremely quick and easy to set up. Once you get an idea of how this works, you'll be able to fiddle around with it to search for other specific forms filed to the SEC.

Basics First. All Forms Have Header Information

Whenever a company files their form to the SEC, there is a certain format that must be followed. For example, you can't just write an annual report and then email it to the SEC.

Each form must comply and contain certain information. That's where header fields come in. Don't worry if you don't know what they are. You just have to know the basics of how to read it.

Below the text between the "< >" is what you call the header field. As you can see below, there are several and you can use each one in your search. Think of it as a filter in your search.

Company Name

CIK

Public Document Count

Accession Number

Form Type

Period

Filing Date

You could use "COMPANY-NAME" to search for a specific company only or include "TYPE" and you can search a specific type of form for a company. This is exactly what I will show you to collect insider transaction filings for a single company.

This is the SEC page for the full list of all [header fields](#) you can use to customize your search.

First: Search for Company Name

Go the [SEC Archives Search page](#). This is the page which you want to use for searching.

In the field, enter **COMPANY-NAME="apple"** and search.



Do you need a pro tracker to Track Insider Transactions? | Flickr: West Midlands Police

EDGAR Search: Enter a [Search String](#) Start: End:
 2011 ▼ 2011 ▼
 (e.g., "company-name = (fund bond)") See [Search Help](#)

1000	APPLE INC	[text] [html]	10-Q
1000	APPLE INC	[text] [html]	8-K
1000	APPLE INC	[text] [html]	8-K
1000	APPLE INC	[text] [html]	4
1000	APPLE INC	[text] [html]	DEF 14A
1000	APPLE INC	[text] [html]	DEFA14A
1000	APPLE KENNETH W	[text] [html]	5
1000	APPLE LANE GROUP LLC	[text] [html]	X-17A-5
1000	Apple REIT Eight, Inc.	[text] [html]	SC TO-T/A
1000	Apple REIT Eight, Inc.	[text] [html]	8-K
1000	Apple REIT Eight, Inc.	[text] [html]	8-K
1000	Apple REIT Eight, Inc.	[text] [html]	8-K
1000	Apple REIT Eight, Inc.	[text] [html]	SC TO-T/A
1000	Apple REIT Eight, Inc.	[text] [html]	SC 14D9
1000	Apple REIT Eight, Inc.	[text] [html]	8-K
1000	Apple REIT Eight, Inc.	[text] [html]	4
1000	Apple REIT Eight, Inc.	[text] [html]	4

You will notice that the results display everything containing the word apple. The next step is to clean up the results by using the exact company name as reported in the SEC. In this case, it is "apple inc". Not case sensitive.

Updating the search term with **COMPANY-NAME="apple inc"** now lists filings only for AAPL.

Second: Include Form Type

Filter

To narrow your search to include only insider transactions, you will have to search for form 4.

Include FORM-TYPE=4 into your search.


The search term should now be
COMPANY-NAME="apple inc"
FORM-TYPE=4

The SEC has kindly added a RSS button so that you can add it to your reader or email. Click and subscribe to it and you'll be sure to receive it as soon as form 4 is filed.

No.		Format	Form Type	Filing Date
1000	APPLE INC	[text] [html]	4	08/02/2011
1000	APPLE INC	[text] [html]	4	08/02/2011
1000	APPLE INC	[text] [html]	4	08/02/2011
1000	APPLE INC	[text] [html]	4	07/27/2011
1000	APPLE INC	[text] [html]	4	07/27/2011
1000	APPLE INC	[text] [html]	4	07/20/2011
1000	APPLE INC	[text] [html]	10-Q	07/20/2011
1000	APPLE INC	[text] [html]	8-K	07/19/2011
1000	APPLE INC	[text] [html]	4	07/07/2011
1000	APPLE INC	[text] [html]	4	07/05/2011
1000	APPLE INC	[text] [html]	8-K	06/15/2011
1000	APPLE INC	[text] [html]	4	06/02/2011
1000	APPLE INC	[text] [html]	4	06/01/2011
1000	APPLE INC	[text] [html]	4	05/23/2011
1000	APPLE INC	[text] [html]	4	05/04/2011
1000	APPLE INC	[text] [html]	4	05/04/2011
1000	APPLE INC	[text] [html]	4	04/28/2011
1000	APPLE INC	[text] [html]	4	04/26/2011
1000	APPLE INC	[text] [html]	4	04/26/2011
1000	APPLE INC	[text] [html]	UPLOAD	04/25/2011
1000	APPLE INC	[text] [html]	10-Q	04/21/2011
1000	APPLE INC	[text] [html]	8-K	04/20/2011
1000	APPLE INC	[text] [html]	4	04/19/2011
1000	APPLE INC	[text] [html]	4	04/19/2011
1000	APPLE INC	[text] [html]	4	04/19/2011

EDGAR Search: Enter a [Search String](#) Start: End:
 Search
 (e.g., "present and not past") See [Search Help](#)

[SEC Home](#) | [EDGAR Search Home](#)

Your search matched 43 documents.
 43 are presented.  [RSS Feed](#)

No.		Format	Form Type	Filing Date	Size
1000	APPLE INC	[text] [html]	4	08/02/2011	4954
1000	APPLE INC	[text] [html]	4	08/02/2011	14277
1000	APPLE INC	[text] [html]	4	08/02/2011	4945
1000	APPLE INC	[text] [html]	4	07/27/2011	13038
1000	APPLE INC	[text] [html]	4	07/27/2011	8472
1000	APPLE INC	[text] [html]	4	07/20/2011	8209
1000	APPLE INC	[text] [html]	4	07/07/2011	8200
1000	APPLE INC	[text] [html]	4	07/05/2011	16140
1000	APPLE INC	[text] [html]	4	06/02/2011	15210
1000	APPLE INC	[text] [html]	4	06/01/2011	5129
1000	APPLE INC	[text] [html]	4	05/23/2011	4525
1000	APPLE INC	[text] [html]	4	05/04/2011	14281
1000	APPLE INC	[text] [html]	4	05/04/2011	5677
1000	APPLE INC	[text] [html]	4	04/28/2011	4321
1000	APPLE INC	[text] [html]	4	04/26/2011	4860

Advanced Searching Using Boolean Operators

For those of you want a bit more flavor, you can refine your searches even finer by using boolean operators AND and OR.

The easiest way to explain things without going into the jargon is to just see an example first.

COMPANY-NAME=("apple inc" OR "netflix") AND FORM-TYPE=(10-Q* OR 10-K*)

In the search string above, I want to find filings for both Apple and Netflix and display both the quarterly and annual reports.

But look, I am not using the AND operator.

The OR operator returns filings for either

1. Apple or Netflix
2. and 10-Q or 10-K.

Use the speech marks " " if the company name has a space in it and the * is used to display any filing beginning with 10-Q. By using the asterisk you can search for amended filings that have the code 10-Q/A. If you just did FORM-TYPE=(10-Q OR 10-K), you wouldn't see any of the amended filings.

For a list of all the other forms, this is the [pdf](#) you want.

And that's how we **Track Insider Transactions** in OSV. What's your customized search string? Share it with us in the comments.