

Ten questions that show what the Zacks MCP can do

A starter set for retail investors and financial advisors: each question maps to a real job — rebalancing a portfolio, judging a stock's performance and valuation, gauging the odds, and making the call — and together they exercise all ten tools in the server.

10 questions 10 / 10 tools exercised 5 user needs covered 2 personas Tool set reviewed 15 Sep 2026

What these users are trying to do

Five jobs came out of the brief. Every question below is written to serve at least one of them, and the labels on each card tie back to this map.

Rebalance a portfolio

Rank holdings, spot Sell-rated names, see sector and fund concentration, check what's inside the ETFs.

Q5Q8Q7

Understand performance

Price moves vs the S&P 500, multi-year revenue and margin trends, what just happened.

Q5Q6Q9

Judge valuation

Forward P/E, PEG, price/sales and book, growth-adjusted comparisons among peers.

Q3Q1Q6

Gauge the odds

Zacks Rank, Style Scores, Earnings ESP, estimate revisions, broker rating trend, surprise history.

Q1Q4Q10

Make the decision

Zacks' dated thesis, reasons to buy and sell, risks, and how the analyst view has evolved.

Q2Q10Q9

The ten starter questions

Each card gives the question as a user would type it, what the answer surfaces, and which tools (and compare_stocks sections) do the work. Tickers are placeholders — users swap in their own.

Q1Quick verdict on one stock

RetailGauge the oddsValuation

"Is NVDA a buy right now? Give me its Zacks Rank, Style Scores, Earnings ESP, and how far it trades below the average analyst target."

Surfaces: Rank 1–5 with recommendation, Value / Growth / Momentum / VGM scores, target-price upside, trailing and forward P/E, PEG, industry rank and position, last-quarter surprise.

get_zacks_metrics

Why it's here: the single most common search intent on zacks.com is "buy or sell" on one name; this is the one-call answer that introduces the Rank and Style Score vocabulary.

Q2The case for and against

RetailAdvisorDecision

"What's Zacks' full thesis on AAPL — the reasons to buy, the reasons to sell, and the key risks — and when was that report written?"

Surfaces: the dated analyst position report: overview, valuation view, buy and sell summaries, risks, last earnings recap and recent news, with the Rank as of the publish date.

get_zacks_research

Why it's here: shows that the MCP carries narrative research, not only numbers — and teaches users the "opinion as of a date" convention from the start.

Q3Valuation shoot-out among peers

RetailAdvisorValuation

"Which of MSFT, GOOGL, META and AMZN is the cheapest on forward P/E and PEG, and which has the strongest projected growth for this year and the next five?"

Surfaces: one row per ticker with identical fields — P/E F1 and F2, PEG, price/sales, price/book — plus the growth-rate block (this year,

Q4Before earnings: momentum and beat odds

RetailAdvisorGauge the odds

"TSLA and GM both report in the next few weeks. How have consensus estimates moved over the last 7, 30, 60 and 90 days, have brokers been upgrading or downgrading, and how often has each beaten estimates?"

next year, past and next five years) for a growth-adjusted ranking.

compare_stocks · GRAT

Why it's here: demonstrates side-by-side comparison with a chosen detail section; the pattern users reuse for any short watchlist.

Surfaces: estimate trend per period, broker rating counts now vs 1/4/8/12 weeks ago, the reported-vs-estimate surprise history, next earnings date and Earnings ESP.

compare_stocks · ETR · BR · SEH get_zacks_metrics

Why it's here: shows the estimate-revision engine that drives the Zacks Rank, and that one question can chain several detail sections.

Q5 Rebalancing check on a holdings list

Advisor Retail Rebalance Performance

"Here are my holdings: AAPL, MSFT, NVDA, JPM, XOM, PFE, HD, COST. Rank them by Zacks Rank, flag anything Sell-rated, show which ones have lagged the S&P 500 this year, and tell me how concentrated I am by sector."

Surfaces: Rank and recommendation, YTD / 4 / 12 / 52-week returns and the same relative to the S&P 500, sector and industry rank, beta, dividend yield, ROE and debt/equity — for up to ten tickers in one call.

compare_stocks · F0V

Why it's here: the core advisor workflow — a whole portfolio in a single call, with the trim/add signals a rebalance needs.

Q6 Is the growth real? Multi-year fundamentals

Retail Advisor Performance Valuation

"Show AMZN's revenue, operating income, net margin and diluted EPS for the last five fiscal years and the last eight quarters. Is the trend accelerating or slowing?"

Surfaces: the condensed snapshot by period, then the detailed income statement (COGS, R&D, SG&A, EBITDA) so margins and growth rates can be derived from reported figures.

get_company_snapshot · A + Q get_income_statement

Why it's here: introduces the standardized, multi-period financial statements and the annual/quarterly period switch.

Q7 Is the dividend safe?

Advisor Retail Rebalance Decision

"Is XOM's dividend safe? Compare operating cash flow with dividends paid and buybacks over the last four years, and check how much debt and cash it carries."

Surfaces: operating cash flow, capex, dividends paid, net buybacks and ending cash by year; long-term debt, cash and equity from the balance sheet; payout ratio and yield from the profile.

get_cash_flow get_balance_sheet get_zacks_metrics

Why it's here: the income-portfolio question, and it exercises the two statement tools not touched by Q6.

Q8 ETF look-through and overlap

Retail Advisor Rebalance

"I hold both SPY and QQQ. List the top 25 holdings of each, tell me how much they overlap, and compare the two funds on expense ratio, Zacks ETF Rank and top-10 concentration."

Surfaces: daily holdings with weights and an as-of date, the overlap set, and fund-level metrics — ETF Rank, expense ratio, AUM, top-10 share, 1-year performance and standard deviation, with peer funds.

get_etf_holdings × 2 get_zacks_metrics · ETF

Why it's here: shows that ETFs are first-class — holdings and fund ratings — which most retail portfolios need for true exposure.

Q9 What just happened?

Retail Performance Decision

"What's the latest Zacks news on PFE and JNJ, and what's driving the overall market today?"

Surfaces: the newest Zacks articles per ticker from the last 72 hours with full text, publish time and link, plus Market News section items via SPY / QQQ for the broad picture.

get_real_time_news · tickers + subcategory 144

Why it's here: the "anything new?" habit; also introduces section-based news without a ticker.

Q10 How has the view evolved?

Retail Advisor Decision Gauge the odds

"CRM fell after its last earnings report. What have Zacks analysts written about it over the past six months — is it a buy on the dip, and has their view changed? What's the Rank today?"

Surfaces: dated commentary pieces newest-first over a chosen lookback, then today's Rank and recommendation presented in time order — the two clocks users must learn not to merge.

get_zacks_commentary · lookback 6 get_zacks_metrics

Why it's here: the time dimension — event-driven analyst opinion versus the daily-recomputed Rank.

Every tool in the server is hit at least once, and the two most-used production tools — compare_stocks and get_zacks_metrics — appear in several questions, matching how real users already call them.

Question	get_zacks_metrics	get_zacks_research	get_zacks_commentary	compare_stocks	get_real_time_news	get_company_snapshot	get_income_statement	get_balance_sheet	get_cash_flow	get_etf_holdings
Q1 Quick verdict										
Q2 Case for and against										
Q3 Valuation shoot-out										
Q4 Before earnings										
Q5 Rebalancing check										
Q6 Multi-year fundamentals										
Q7 Dividend safety										
Q8 ETF look-through										
Q9 What just happened										
Q10 How the view evolved										
questions using tool	5	1	1	3	1	1	1	1	1	1

primary tool for the question supporting tool not used

PERSONA BALANCE

Who each question is written for

Retail investors are the larger audience, so every question reads naturally for them; eight of the ten also serve advisors managing client portfolios, with Q5, Q7 and Q8 leaning advisor-first.



A useful onboarding path: retail users start at Q1 → Q9 → Q3 → Q2; advisors start at Q5 → Q8 → Q7 → Q4.

SCOPE GUARDRAILS

What the starter set deliberately avoids

Each of these is a known gap today, so a first question that hits one produces a bad first impression. Keep them out of onboarding copy until the tools exist.

- Screening — "find me all Rank #1 stocks under \$50" — no universe-screening tool yet.
- Price history and back-tests — only 52-week range and 1/4/12/52-week and YTD changes are available.
- Historical Rank or estimate archives — estimate history is rolling (7–180 days); Rank history is current + previous.
- Mutual funds and non-North-American listings — not covered; foreign-exchange suffixes don't resolve.
- Real-time quotes and investment advice — every answer should carry the as-of date and Zacks attribution.