

PURPOSE

Select the Heatmap View to get a quick and customizable visual assessment of layered risk. [A](#)

HOW TO USE THIS FEATURE

- Each square represents a position in your portfolio.
- Square size indicates % weight or position size of the portfolio.
- Color-coding functionality lets users visualize risk quickly. Color denotes level of risk: red=high, green=low.
- Customize your view using the Settings Menu. [B](#) Group securities by sector, rating, geographic location or other key risk buckets.
- Click on any square to jump to the **Obligor View** and begin deep dive credit analysis. [C](#)
- Toggle to Grid, Summary or Scatter Plot Views for further portfolio-level analysis. [A](#)

QUICK TIPS

Access Settings Menu to Customize the Heatmap

Click the gear button at the top right of the screen and select the Portfolio View tab. Here, you can select grouping and sorting for the Heatmap. Click OK to apply changes. [B](#)

Hover Over Squares for More Info

Mouse over any square for a brief overview of that security. [C](#)

