


PURPOSE

Run a summary report on your portfolio or watch lists (or compare portfolio vs. index) in a variety of formats, including tables, bar charts / histograms and pie charts.

HOW TO USE THIS FEATURE

- From the Grid or Heatmap View, select Summary **A** to populate the report of the portfolio or bulk security list you are currently running (depicted below by blue bars).
- Select multiple criteria to group by (either via the Summary Views shortcut button or the Settings Menu). **B** Both the table and the chart will update based on your selections.

Compare your portfolio to another in the form of exposure breakdowns.

- Note: the comparative portfolio must already be saved to the Portfolios List **C**. You must run the comparative portfolio  first before it can appear in the chart.
- Click Comparative Portfolios **D** to select from your list of portfolios. The second portfolio will appear in the bar chart (depicted below by orange bars). Click Portfolio Summary Report **F** to download a PDF report.
- Toggle to Grid, Heatmap or Scatter Plot Views for further portfolio-level analysis. **A**

QUICK TIPS

Compare by Weight

Remember to set comparative portfolios by weight. **E**

Benchmark Your Portfolio

Upload an index or mutual fund to conduct a quick assessment of your portfolio or target portfolio.

Absolute Value or % Change

Throughout the application, you can elect to view data in absolute value terms or by percentage. Simply click the % Change button on the top right of the screen. Click again to switch back to Absolute Value. **F**

