

- Compare investments with tickers separated by space or comma:

Ticker(s) or #MyInvestments or Ticker Box Options

SPY, IWM, EFA, EEM

This will display total return charts including dividends reinvested

- Enter start and end years for the chart or a full date:

Start End OR Start End

2015 2019 2/20/2018 1/1/2019

To show a client how they did, consider using the dates when they bought the investment.

- If you want to show all investments with drops greater than 2% on the charts, enter it here:

Display drops > %

2

This is on the top bar

- If you want to show the top 5 drops on the charts, enter it here:

Display top drops

5

This is on the top bar

- To compare the S&P to your own model, enclose it in parenthesis with coefficients:

Ticker(s) or #MyInvestments or Ticker Box Options

(40 SPY, 10 IWM, 30 EFA, 20 EEM), SPY

The first data point will be 100 (sum of coefficients). Portfolio is rebalanced on Dec 31 as indicated by a diamond on the chart.

- To save your model for easy retrieval, use a keyword that starts with # in the Description:

#MyETFModel this is my first model and I can write anything

Description field is below each chart

- To save symbols of a model or list, use same keyword starting with # in each Description:

#MyModelPositions and when the wholesaler was here I use #WholesalerWatchList

Make sure you copy/paste the same keyword into each Description for the symbol

- To show the price chart vs. the total return chart of an investment, put a – in front of symbol:

AGG, -AGG

The default is always a total return chart in the Ticker Box

- To name or category search any investment, put a ? before the search terms in Ticker Box:

?fideli ?real est ?energ

Use the ? in the Ticker Box

- To compare charts and performance aligning start and end dates for comparison, click:

Align Dates On All Charts

-This is button in on the bottom right corner of the screen.
-If you click and drag on the chart, it will zoom into all charts simultaneously.
-This button with also normalize monthly vs daily quotes.

charting toolbox

- To see additional information for an investment, click the Morningstar link:

[Morningstar](#) This is on the bottom right corner of chart

- To see other funds in the same Category of the investment, click the category name:

Real Estate × -This is on the top right corner of the chart
 Click Category for alternatives -The X on the extreme top right corner will Close the chart

- Clicking the category “Real Estate” in the example above, or any Category reveals:

Real Estate
[See All](#)

Cohen & Steers Real Estate Securities I

CSDIX STATS

3YR Sharpe Ratio: **0.4**

3YR Std Dev: **0.01**

1YR Category Rank: **40th**

TTM Yield: **3.6%**

Expense Ratio: **0.9%**

Vanguard Real Estate ETF

VNQ STATS

3YR Sharpe Ratio: **0.2**

3YR Std Dev: **0.01**

1YR Category Rank: **51st**

TTM Yield: **4.8%**

Expense Ratio: **0.1%**

Draw a chart

Close panel

ETFs

VNQ <-See All to show all funds in this category

SCHH <-The first 3 ETFs are the largest ETFs by Assets

IYR

REM

MORT <-The last 2 ETFs are the ones with the best sharpe ratio

Mutual Funds

FRIFX

GURIX <-The funds are the ones with the best sharpe ratio

RPFRX

- To see the best performing “Bond” categories or “Sectors” for the last 6 months:

Investments **Support**

Watchlist

Categories

Examples

Hashtags

Non-Listed

Cryptocurrencies

Fund Families

Investment Universe

- 1) Click on Investments -> Categories
- 2) Click “6m Return” to sort by 6 month return
- 3) Narrow the display categories to “Bond or “Sector” by entering it in the filter box:

Narrow down categories

sector ×

OR

Narrow down categories

bond ×

- Click on Investments -> Hashtags to display your Hashtags mentioned above:

#2018Q3ModelEquityLowFee_Positions

ACWW EFAV EEMV IJR DIA **VONG** OGIYX

The symbols are color coded. Green means the 1 year category Rank is in the top 3rd. Yellow means the 1 year category rank is in the middle 3rd. Red means the 1 year category rank is the bottom third. Visually you can determine which funds need attention and maybe switched from your model.

- Click on Investment -> Investment Universe to restrict funds to a firm or platform when using searches using “?”, category suggestions (clicking the Category name), and category fund lists.

- Click Investments -> Non-Listed to see SMAs, Alternative Investments, or other portfolios that have monthly or quarterly returns. Don’t forget to click on “Align Dates on Charts” button (bottom right corner) to compare these non-listed investments with monthly quotes to publicly trades symbols with daily quotes. To import any non-listed investment, email us monthly or quarterly return and we will add it in our system.