

The Top Metrics Advisors Use in Client Investment Reports: 2024

Since launching a full reporting suite in the fall of 2023, YCharts users have collectively generated over 500,000 reports and proposals.

We looked at which financial metrics were most used in these reports to understand advisors' preferred talking points and talk tracks when meeting with clients and prospects.

The Top 10 metrics used by advisors in YCharts-generated reports in 2024:

1 Stock Allocation

2 Bond Allocation

3 Dividend Yield

4 Beta

5 Average P/E Ratio

6 Max Drawdown

7 Expense Ratio

8 Historical Sharpe Ratio

9 CAPM Expected Return

10 YTD Total Return

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