YCHARTS

YCharts Quick Start Guide

for Advisors

Table of Contents

Table of Contents

Setup Your Dashboard

Your YCharts Dashboard gives a holistic yet personalized view of the market with intraday price quotes, charts, and data for all of the equities, mutual funds, ETFs, and portfolios you closely follow. Since you choose the securities and information to display, your Dashboard keeps you abreast of the most relevant market movements for you, your investments, and your competitors. Plus, your firm can create shared Watchlists to ensure all members of the team are aligned on which assets to monitor.

- Build Watchlists for Equities, Funds, Model Portfolios & Economic Indicators
- Pre-built Templates
- Module Options
- Add Charts
- Personalized Ticker Tape
- Share Modules

Watch the Dashboard in Action!

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

Build Watchlists for Equities, Funds, Model Portfolios, & Economic Indicators

1 Navigate to the **Dashboard** tab that you want to update. Click the tab's name to open the various Dashboard options, and click **"+ Add Module"**.

2 A pop-up will appear with various modules that you can add to your custom Dashboard. Watchlist creation options will be available for both "Security List" and "Economic Indicator List".

To create a NEW watchlist:

→ Click **"+ NEW WATCHLIST"** for the corresponding dataset of interest. Note that the "Security List" will also allow users to add previously created Model Portfolios in addition to securities.

→ Next, name your watchlist.

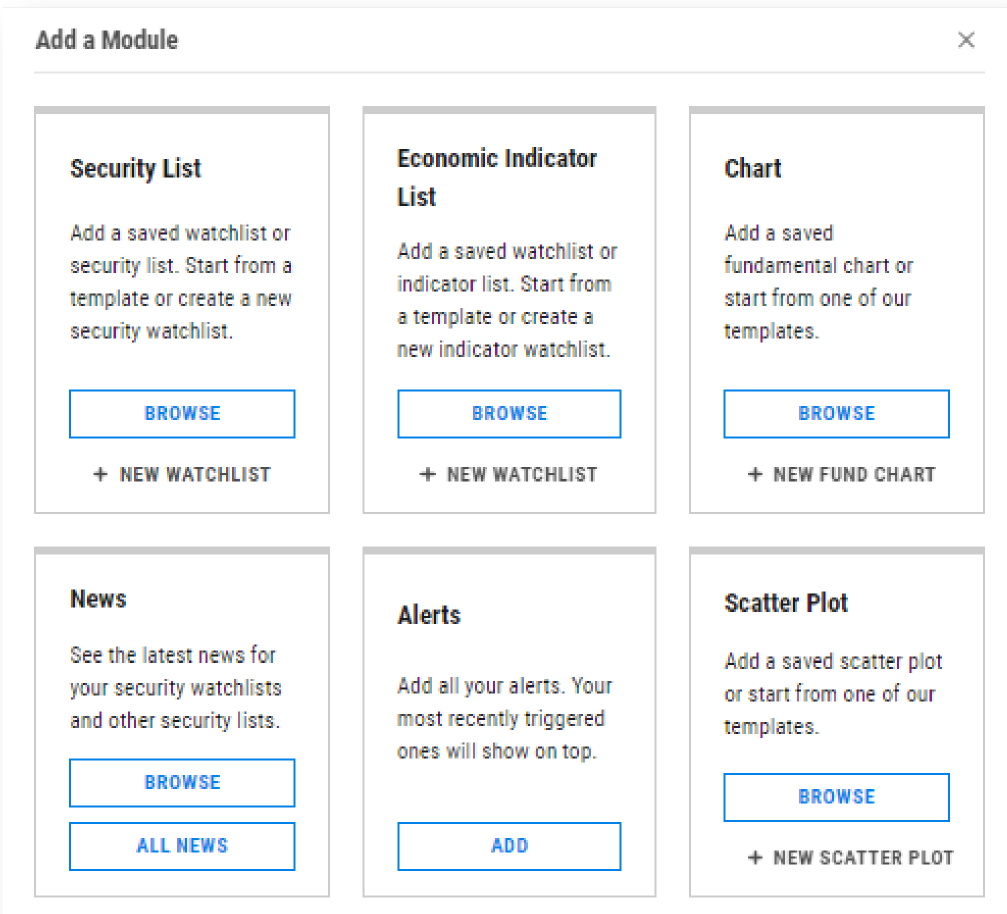
→ Then, using the pop-up's search bar, enter each security name, ticker, or economic indicator — suggested results will appear as you type, click a suggested result or type a ticker like "AAPL" and press Enter on your keyboard.

→ Click **"Save"** once complete and a module will be added to your Dashboard.

Build Watchlists for Equities, Funds, Model Portfolios, & Economic Indicators

To add a module for an EXISTING watchlist/Security List (e.g. Large Cap/Blend Equity Style):

- Click **"Browse"** and a pop-up will appear for different options including: "My Lists" (contains previously saved and shared watchlists and screens) "Equities", "Funds", and "Indices".
- Once you've identified the watchlist of choice, hit **"Submit**". A module will be added to your Dashboard with the same name as the chosen list.



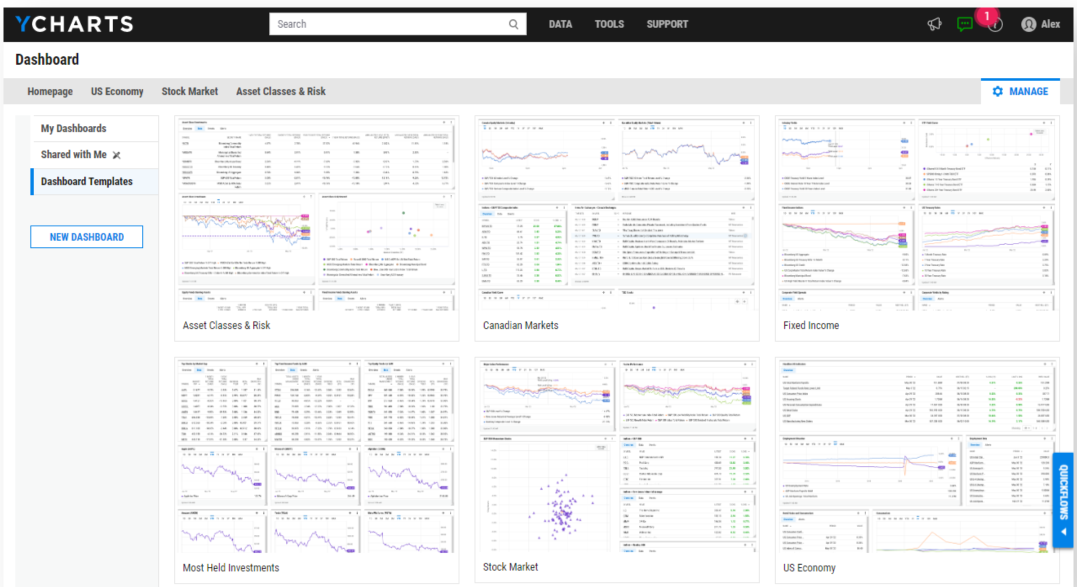
Visit the YCharts Dashboard

Prebuilt Templates

1 From the **Dashboard** homepage, click **“Manage”** in the top right corner of the page.

2 In the left panel, click **“Dashboard Templates”**.

3 Click on the template of interest to add it to your account, and rename it as needed. This will become the Dashboard tab’s name. Click **“Create”** once complete.



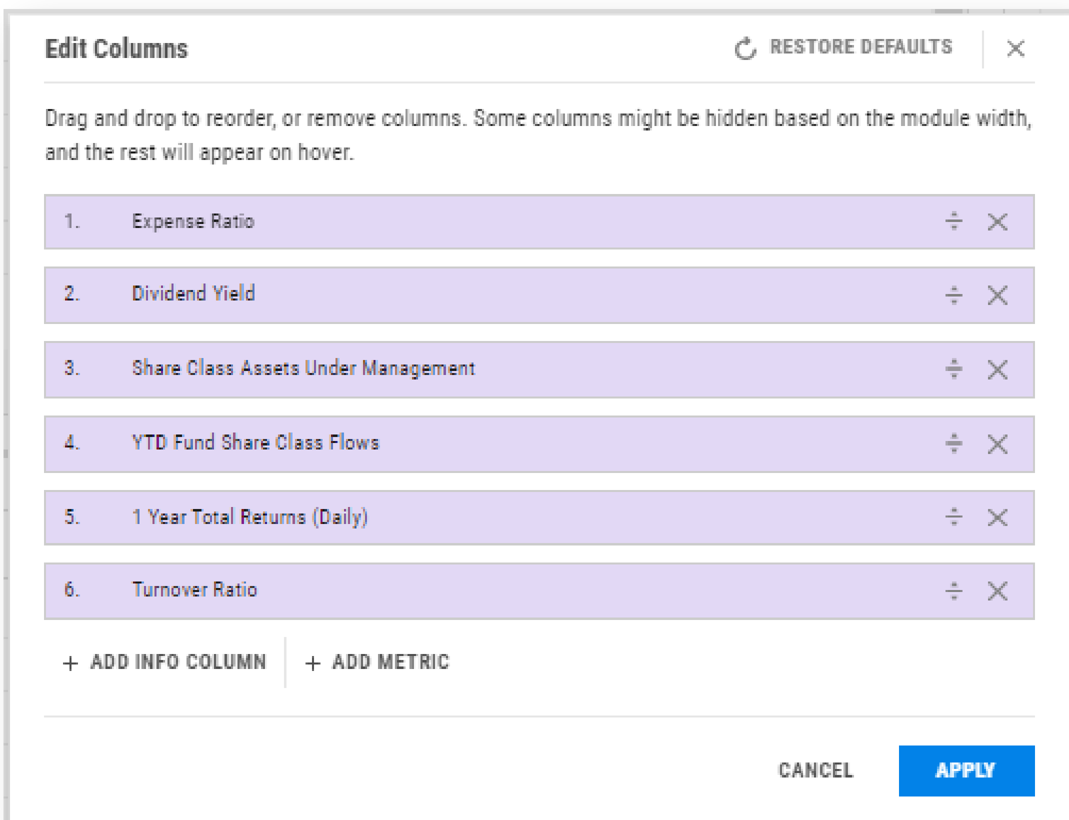
Visit the YCharts Dashboard

Module Options

1 For Securities modules, you will see four tabs “Overview”, “Data”, “Events”, and “Alerts”. For Model Portfolio modules, you will see five tabs “Overview”, “Data”, “Events”, “Alerts”, and “Holdings”. To edit the “Data” tab’s columns, click the **“vertical three dots”** button in the upper right corner of the module and click **“Edit Data Columns”.**

→ A pop-up will appear allowing you to **“+Add Info Column”** and/or **“+Add Metric”**. Use the search bar or browse the category options to add datasets of interest.

→ You will have a maximum of six data columns within the “Data” tab. Shift the order of your chosen datasets using the **“Re-Order Arrows”** directly left of the **“X”** delete button. The top six info/metrics highlighted in purple will be added to the module once you hit **“Apply”**.



Visit the YCharts Dashboard

Module Options

2 In addition to the "Edit Data Columns" option, you'll also be able to:

→ **Swap in a different Security List:** Click **"Change Security List"** from the dropdown and select any previously created Watchlist or other available securities list from the pop-up.

→ **Update an Existing Watchlist**: Click **"Edit Watchlist"** from the dropdown and use the search bar to add a security, model portfolio, or indicator depending on Watchlist type.

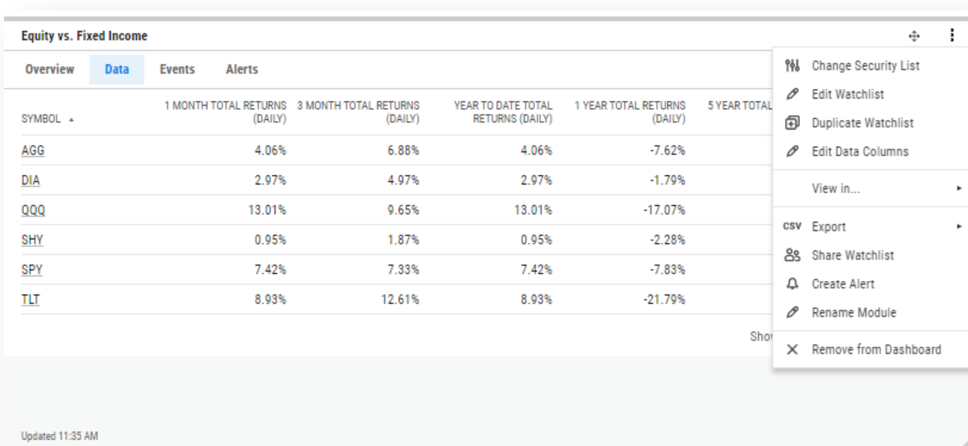
→ **Copy a Watchlist:** Click **"Duplicate Watchlist"** from the dropdown and a pop-up will appear with the option to rename the module and even add or delete securities. Click **"Save"** to add this duplicated module to your Dashboard.

→ **View the Watchlist in various tools:** Hover over **"View in…"** from the dropdown to see the various tools options available, including the Stock Screener, Fund Screener, Comp Tables, Timeseries Table, News, Technical Charts, and Fundamental Charts. Click on the tool of interest and the Watchlist's securities will automatically be pulled into the associated tool page.

→ **Export a Watchlist:** Hover over **"Export"** from the dropdown and choose from the various associated datasets (e.g. Overview, Earnings Events, Dividend Events) to export to a .CSV file.

→ **Update the Name:** Click **"Rename Module"**. A popup will prompt you to enter a new name for the module. Click **"Submit"** to update.

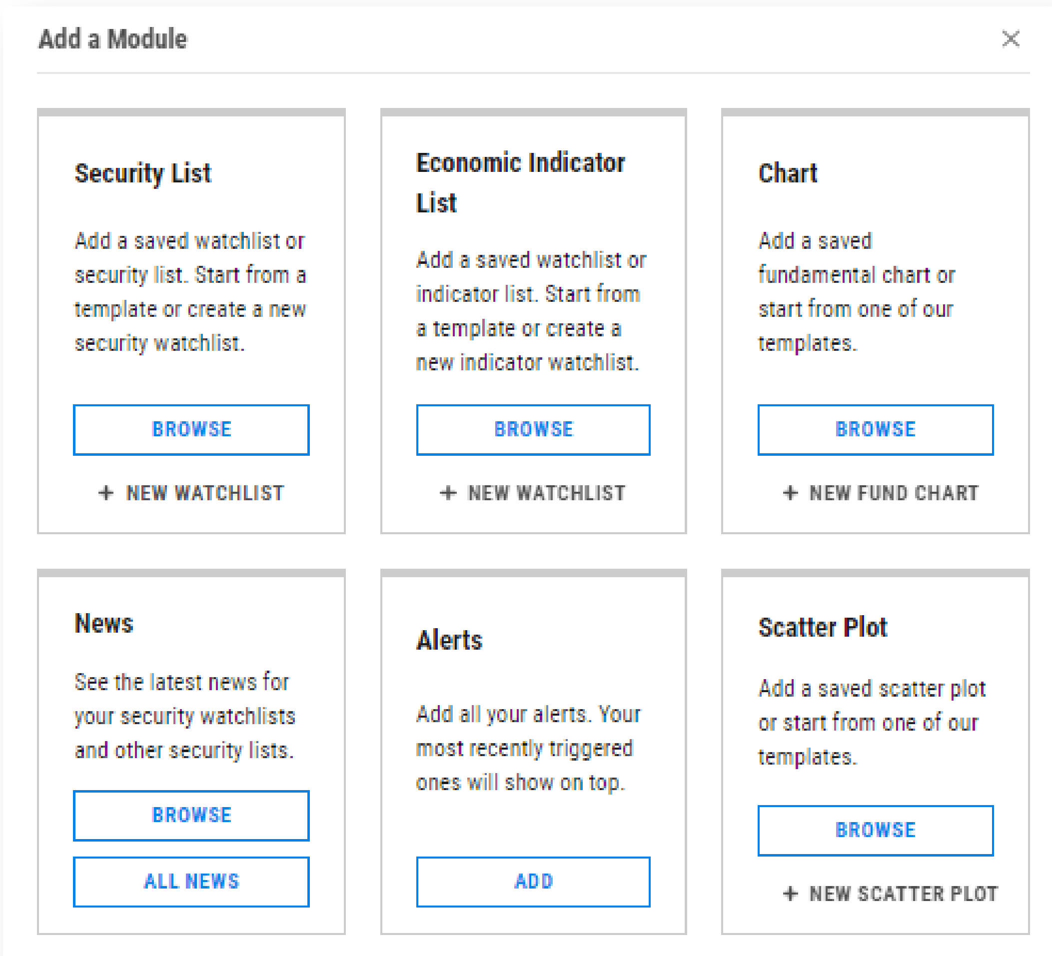
→ **Delete from your Dashboard:** Click **"Remove from Dashboard"** from the dropdown to remove a module from the Dashboard.



Visit the YCharts Dashboard

Add Charts

1 Navigate to the **Dashboard** tab that you wish to update. Click the tab's name to open the options dropdown menu, and click **"+ Add Module"**.



Visit the YCharts Dashboard

Add Charts

2 A pop-up will appear with various modules that can be added to your Dashboard. Visual-based module options include “Chart” and “Scatter Plot”.

To add a module for a previously saved Chart or Scatter Plot:

→ Click **“Browse”** and to see all previously created visuals within your account, as well as any previously shared with you.

→ Click the name of your chosen chart and a module will be added to your Dashboard with the same name.

To add a NEW chart:

→ Navigate to **Fundamental Charts** or **Scatter Plot** to create a visual. Save it to your account by clicking the **“New Fundamental Chart (unsaved)**” or **“New Scatter Plot (unsaved)”** dropdown and clicking **“Save as…”**.

→ Name the visual and click **“Save”** once complete.

→ Next, follow the same steps listed above for “To add a module for a previously saved Chart of Scatter Plot”.

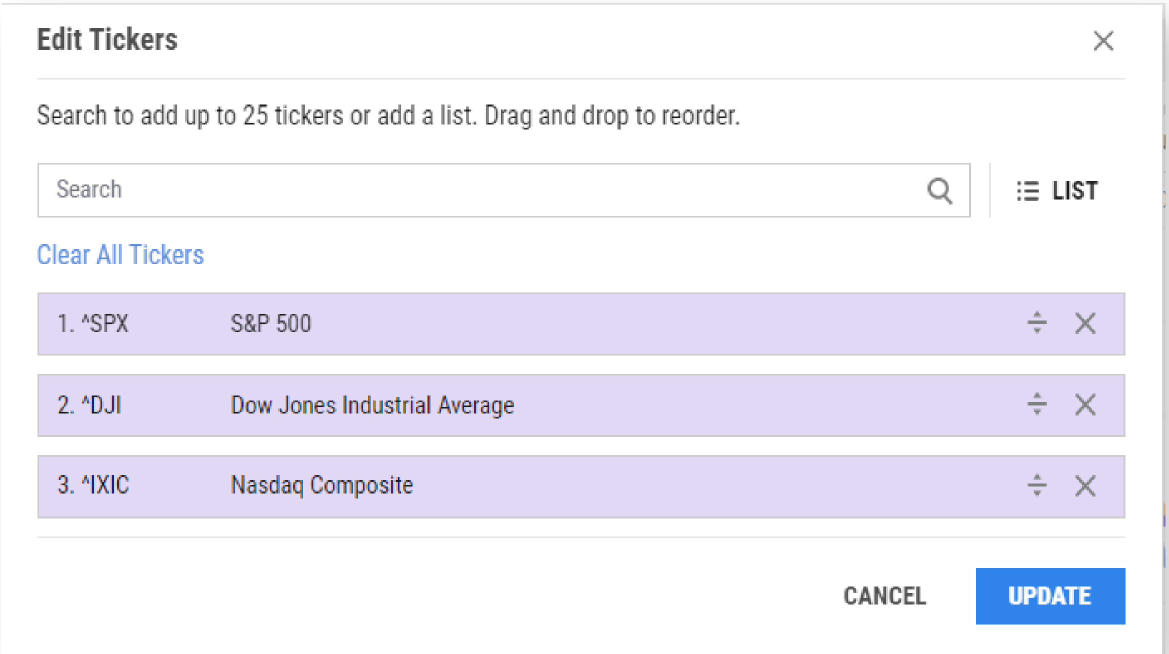
Personalized Ticker Tape

1. To edit any of the tickers above the **Dashboard**, hover over the populated ticker tape and click the **pencil** button in the far right.

2. Then, using the pop-up's search bar, enter each security name or ticker — suggested results will appear as you type, click a suggested result or type a ticker like "AAPL" and press Enter on your keyboard. You can add up to 25 tickers.

3. Shift the order of your chosen datasets using the **"Re-Order Arrows"** directly left of the **"X"** delete button.

4. Click **"Update"** once complete and the ticker tape will be updated on your Dashboard.



Visit the YCharts Dashboard

Share Modules

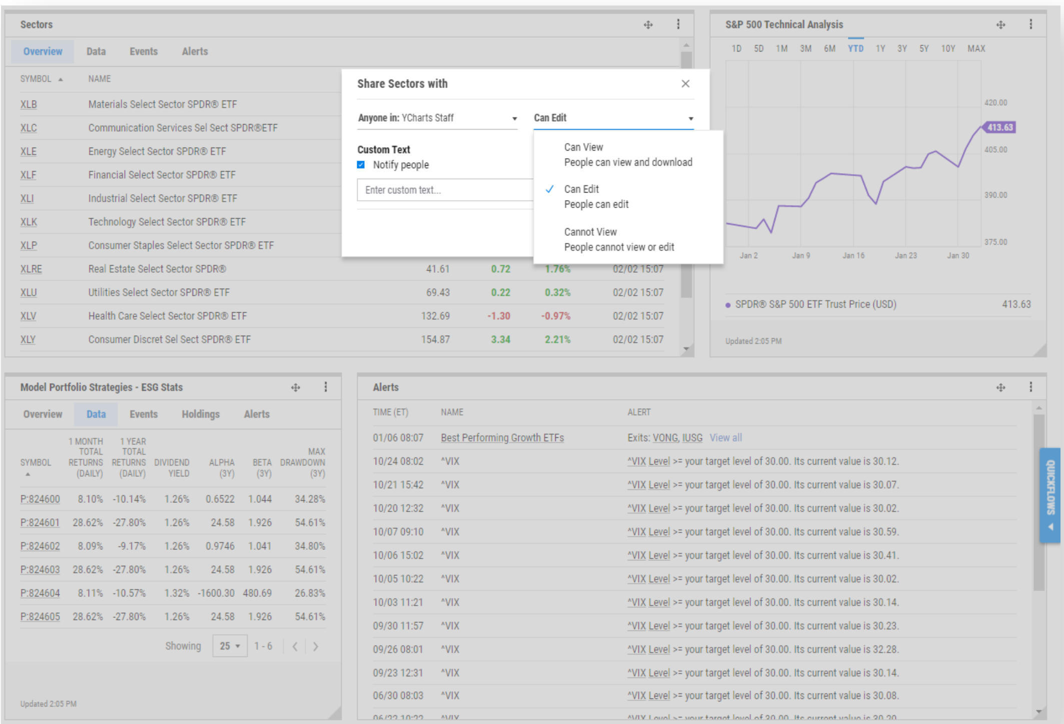
1 1. From the **Dashboard**, identify the module you want to share and click the **"vertical three dots"** button in the upper right corner of the module and click **"Share Watchlist".**

2 From there, a pop-up will appear prompting you to define who to share the module with. Click the following dropdowns:

- → **"Anyone in:"** to designate which user groups you want to edit access for.
- → **"Can Edit"** to determine what level of access they will be given. Choose from **"Can View"**, **"Can Edit"**, or **"Cannot View"**

3 Lastly, check (or uncheck) the **"Notify people"** checkbox depending on if you want to alert the associated group of their change of access via email. You can also add a note in the text box to provide some context behind the type of information you are sharing with them too.

4 Once configured to your specifications, hit **"OK"**.



Visit the YCharts Dashboard

Create Impactful Visuals in Fundamental Charts

While most investment charting tools are limited to price, YCharts lets you visualize any metric, from alpha to yield and everything in between. Using Fundamental Charts, compare performance and valuations for multiple equities, funds, ETFs, or portfolios, investigate trends in the market, and create client-friendly visuals with your custom colors and firm logo.

- Overview
- Pre-built Templates
- Custom Annotations
- Adding Lines & Text to Charts
- Ratios, Spreads & Correlations
- Share Charts

See Fundamental Charts in Action!

Overview

1 Highlight **Tools** in the top banner then select **Fundamental Charts** in the dropdown menu.

2 Use the left control panel to build a chart and select formatting options:

- In the **Securities** field, type to search for security names, fund and company tickers, or economic indicator names.
- Type to search for **Financial Metrics** you'd like to manually add or click **"Browse"** to see all available metrics by category.
- Use the **Data Format** and **Panel Layout** options to adjust how data is presented in the chart.
- Set the chart's time period using the lookback period options just above the charting field, or use the **Date Range** selectors to define start and endpoints.

3 Click **"Presentation View – On/Off"** at the top right of the page to switch between the interactive and presentation-friendly views.

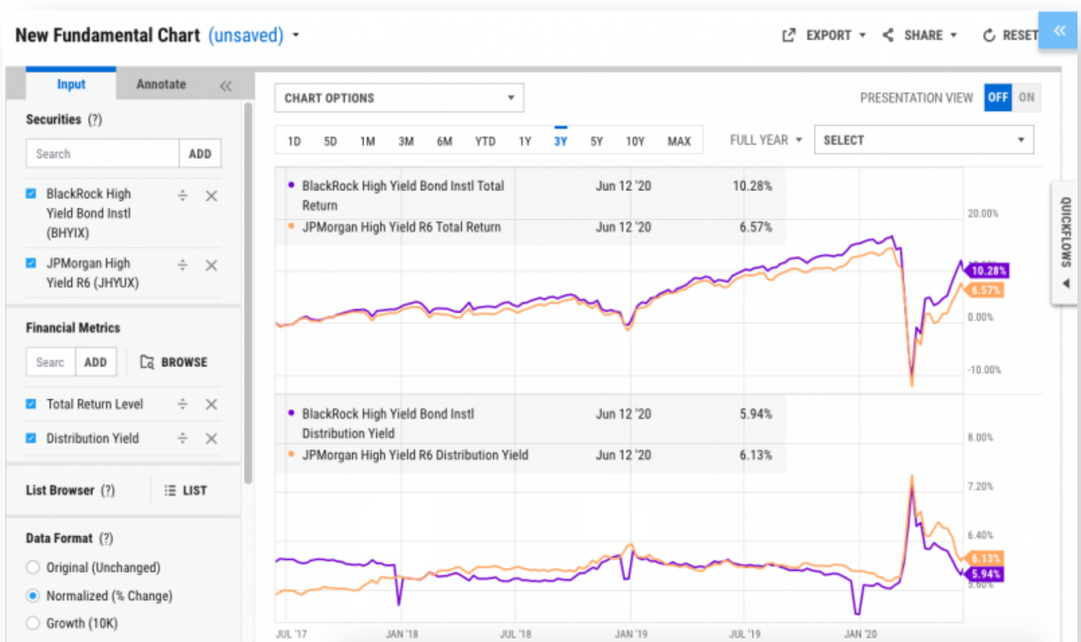
- You can add their own Title and Notes within **Presentation View** to provide a commentary or analysis of the constructed chart.
- You can also add company customizations including firm logos and company colors within **Report Branding**. Click your profile in the top right, select **Manage Account**, then click **"Report Branding".**

Overview

4 Add additional detail using the **Chart Options** dropdown including forward estimates, chart legend options, US recessionary periods, and the data range, among others. Note that there will be more options in "Presentation View".

5 Click **"Export"** to download a sharable chart image, export data to a .csv file, and see print options.

6 Click **"New Fundamental Chart (unsaved)"** to Save or Name your created chart, plus other options.



View in Fundamental Charts

Pre-built Templates

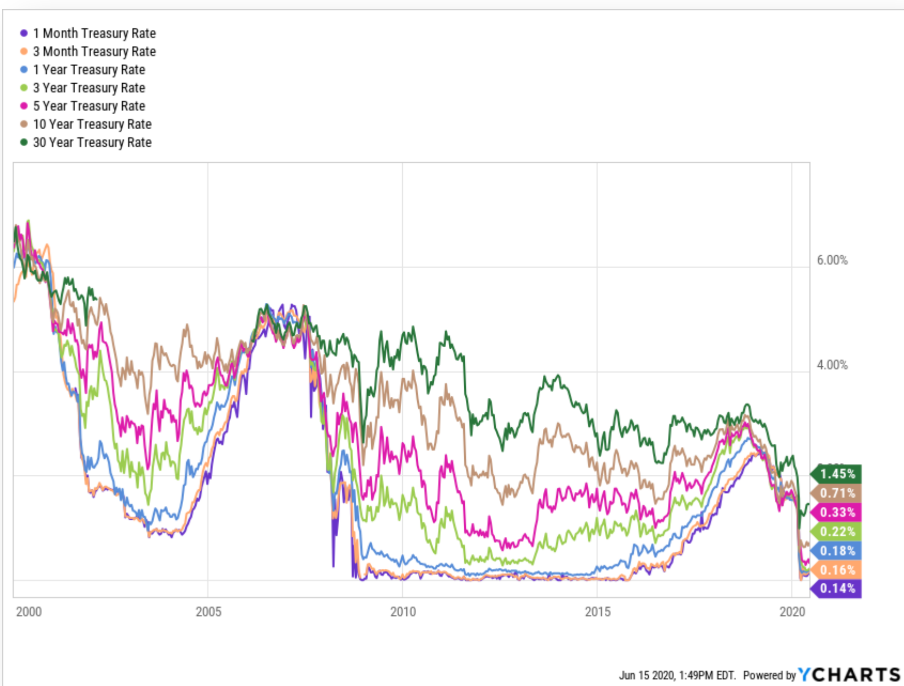
1. Highlight **Tools** in the top banner then select **Fundamental Charts** in the dropdown menu.

2. Click **"New Fundamental Chart (unsaved)"** then select the first option, **"New from Template".**

3. Choose from pre-built charts that visualize trends in Economic Data, **Major Asset Classes,** and **Equities**. Popular templates include:

   - **Major Asset Class Performance**
   - **Performance of Cryptocurrencies**
   - **Russell Market Cap Index Breakdown**
   - **Intraday Yield Data**
   - **Major Oil Indicators**
   - **Mortgage Rates Chart**
   - **US Treasury Yield Curve Analysis**
   - **E-Commerce Stocks**
   - **S&P 500 Fundamentals**
   - **Style Factors vs. S&P 500**

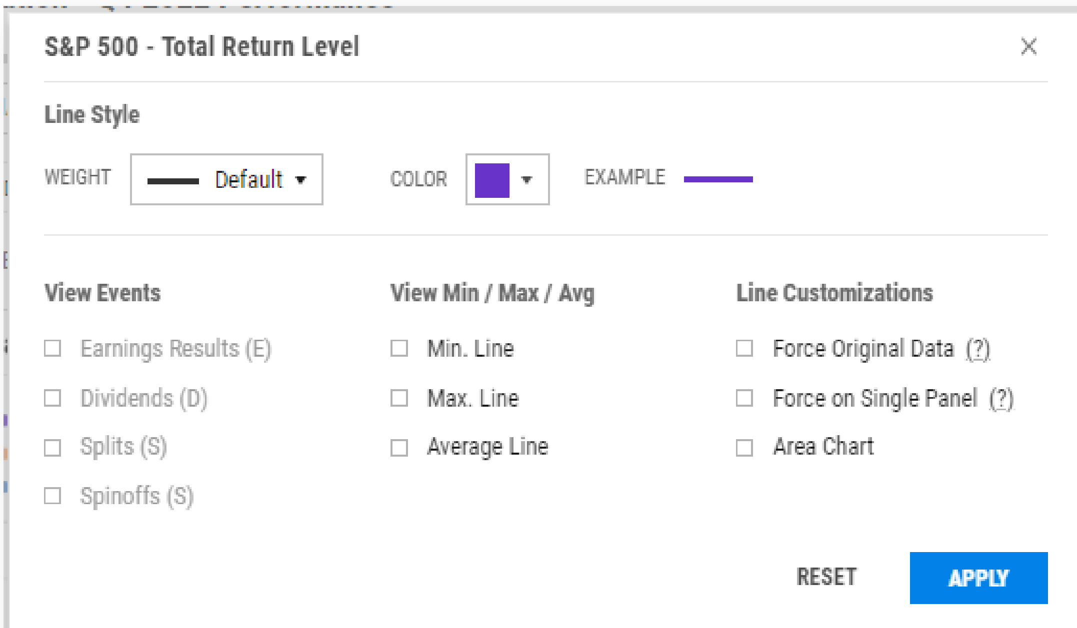
*Example: the **US Treasury Yield Curve Analysis** template automatically creates a visual representation of recent trends in US Treasury rates from 1 month to 30-year durations.*



View in Fundamental Charts

Add Custom Annotations

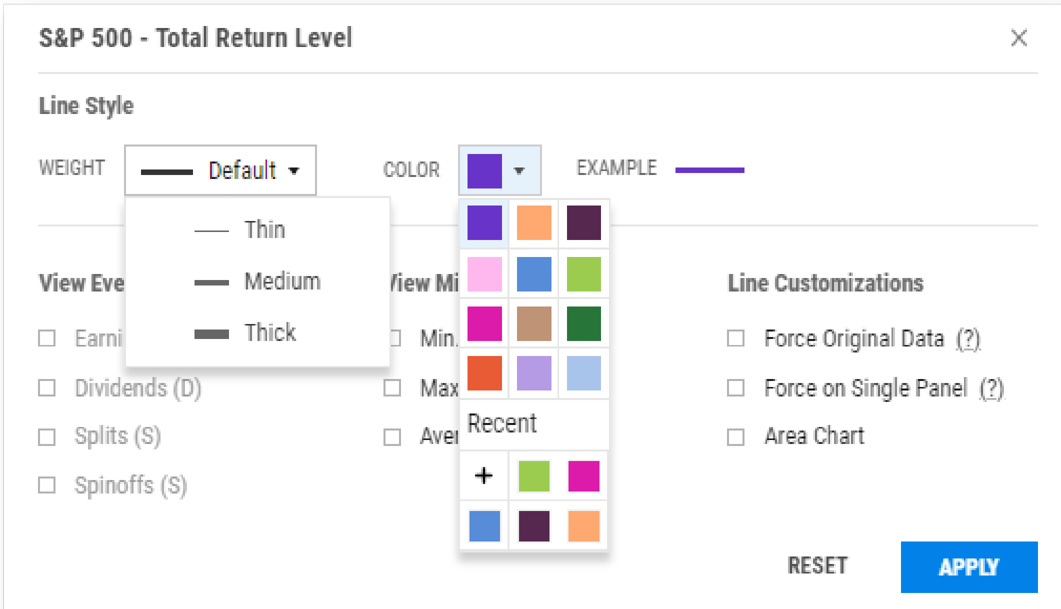
1 Change the color and weight of chart lines and add additional call-outs using the **"Annotate"** tab at the top left corner of the screen. Hit the **"Cogs"** button to the right of the security and metric you wish to annotate. The below pop-up will appear.



View in Fundamental Charts

2 Within the "Line Style" section, update the line **"Weight"** and **"Color"** by clicking their respective dropdowns and selecting from the available option. To add branding such as firm logos and company colors, update those preferences within **Report Branding.**

Add Custom Annotations



View in Fundamental Charts

3 For both the “View Events” and “View Min/Max/Avg” annotations, select any of the checkboxes to add “flags” to your chart. Note that the “View Events” options may not be available for all datasets (e.g. indices).

4 For “Line Customizations”, click:

→ **“Force Original Data Format”** to override any chart-level Data Format selections (i.e. “Normalized”, “Growth”, and “Percent Off High”) and revert that chart line back to its original data format.

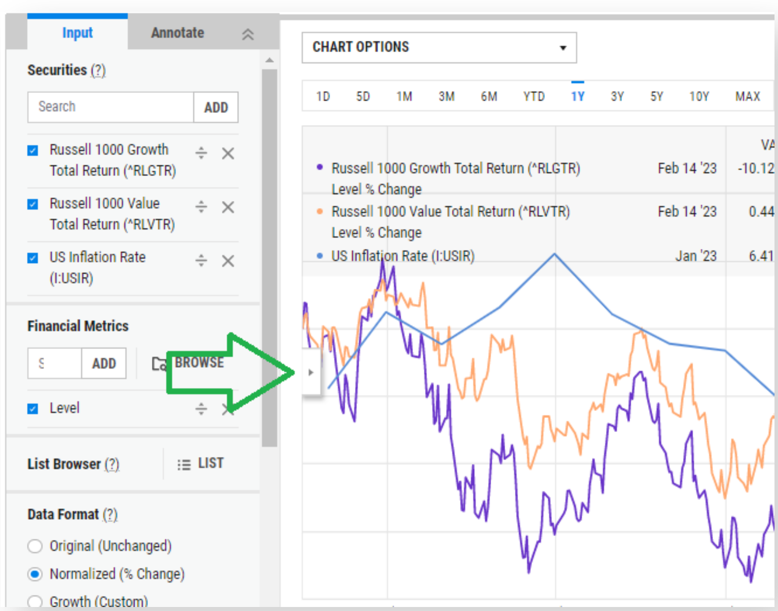
→ **“Force on Single Panel”** to override any chart-level Panel Layout selections and place that chart line on a separate panel.

→ **“Area Chart”** to shade-in the area between the line and the chart’s x-axis.

Adding Lines & Text to Charts

1 First ensure “Presentation View” is OFF, then click the **right-pointing triangle** to reveal additional annotation options, which include:

- → **Cursor Options:** Select between the default cursor or a crosshair cursor.
- → **Adding Text:** Click the **“T”** icon, then click anywhere in the chart to add text. A text box will appear with pre-populated text, which you can update via the pop-up for font size, font color, text bubble color, text updates (via the **pencil icon**), and deleting the caption (via the **trash icon**).
- → **Adding Shapes:** Click the **circle icon** and select between the circle or rectangle to add shapes. Once selected, click the chart area once, move your mouse to increase or decrease the shape’s size, then click again to lock in that size. You’ll also have the option to adjust the shape’s color and border width via the pop-up.
- → **Adding Lines:** Click the **line icon** to reveal a menu of available options. Similar to the shapes functionality, select the line type you’d like to add and then click the chart area to set the line’s starting point. Depending on the line type, you’ll need to click the chart area again to confirm the line length (e.g. trend segment, arrow segment), direction (e.g. arrow ray, arrow line), or its fill area (e.g. parallel channel).



View in Fundamental Charts

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

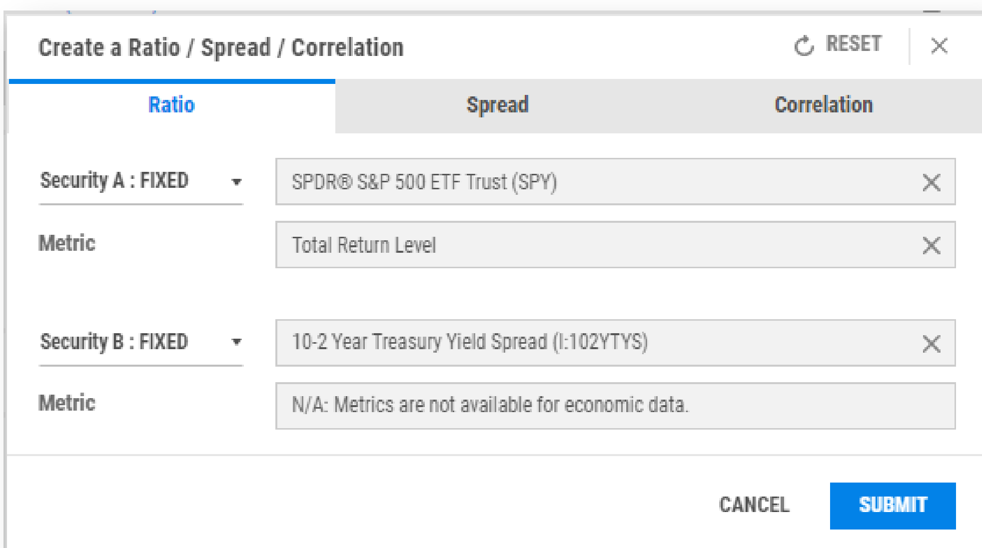
Ratios, Spreads & Correlations

1 Use the “Securities” field in the left panel to type and search for security names, fund and company tickers, or economic indicators for which you’d like to add a Ratio, Spread, or Correlation.

2 Click “**+Create**” in the “Ratios/Spreads/Correlations” section, located further down the left panel. A pop-up will appear prompting you to select the securities and metrics to be used.

3 First, toggle between the **“Ratio”**, **“Spread”**, and **“Correlation”** tabs to designate which type of series you’d like to add to the chart.

4 Add a security and financial metric in the “Security A” and “Security B” areas. A financial metric is not required for economic indicators.



View in Fundamental Charts

5 Additionally, for:

- **Spreads:** Enter an associated “Weight” for each data type.
- **Correlations:** Enter an associated “Lag” for each data type and the “Number of Lookback Periods” you’d like to see.
- Click **“Submit”** once complete.

Share Charts

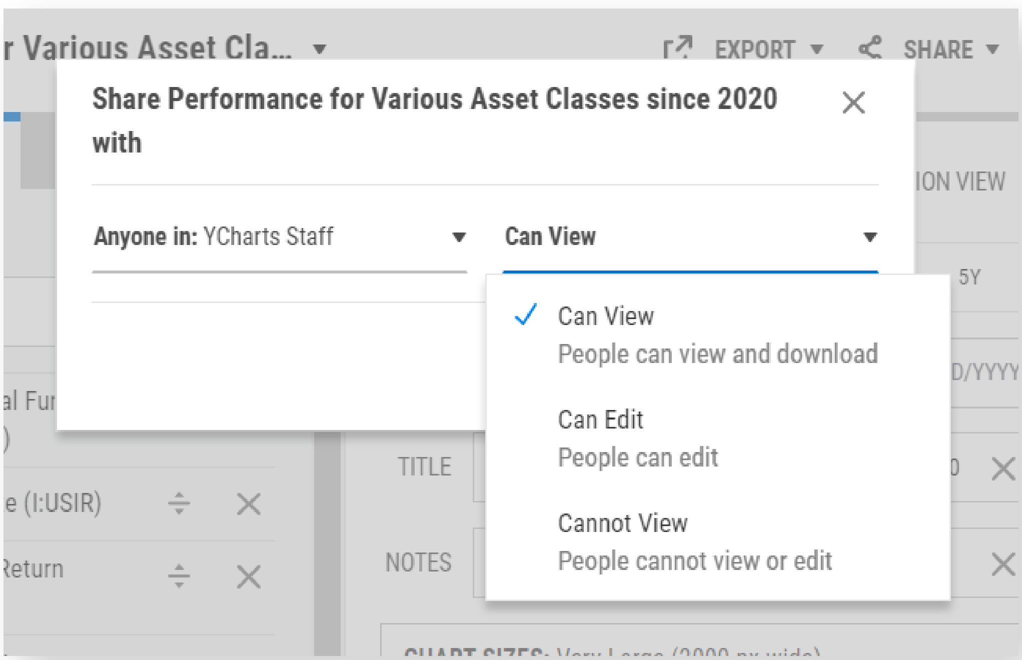
1. Once you've built a chart within **Fundamental Charts**, share it with their teams by clicking the **"Share"** button at the upper right.

2. Next, click **"Share with Team"** (if your and your colleagues' accounts aren't connected, this option will be grayed out) and a pop-up will appear.

3. Within the pop-up select the "**Anyone in:"** dropdown to designate which groups you would like to share your screen with.

4. In the next dropdown, select between **"Cannot View"** (defaulted), **"Can View"**, and **"Can Edit"** depending on the type of access permissions you want to provide.

5. Once both dropdowns have been configured to your specifications, hit **"OK"**.



6. To retrieve previously shared charts, click **"New Fundamental Chart (unsaved)"** in the upper left. Then select the second option, **"Open"**. From there, navigate to the "Shared with Me" tab to view all previously shared charts from your team.

Compare Securities with Scatter Plot

The Scatter Plot enables you to create a visual comparison between two related metrics for a security or group of securities, such as performance and risk. Pick any two security metrics as your X-axis and Y-axis data points, plus choose from a point-in-time Scatter Plot or Timeseries to identify trends.

- Overview
- Pre-built Templates
- Annotate Your Scatter Plot
- Plot an Efficiency Frontier
- Share Scatter Plot

Watch the Scatter Plot in Action!

Overview

1 Highlight **Tools** in the top banner then select **Scatter Plot** in the dropdown menu.

2 Use the left control panel to build a Scatter Plot and select formatting options.

3 In the **Securities & Lists** field, type to search for security names, fund and company tickers, or economic indicator names. Alternatively, click on **"List"** to pull in a previously saved Watchlist from the "My Lists" tab or other securities lists organized by category using the "Equities", "Funds", or "Indices" tabs.

4 Under the **Scatter Plot Type** section, select between a **"Point in Time"** or **"Timeseries"**. Each is defined as follows:

→ **Point in Time:** Allows you to plot a single X and Y data point for each security added to your chart. You can select any metric for your X-Axis metric and Y-Axis metric, and also choose a historical as-of-date for each metric.

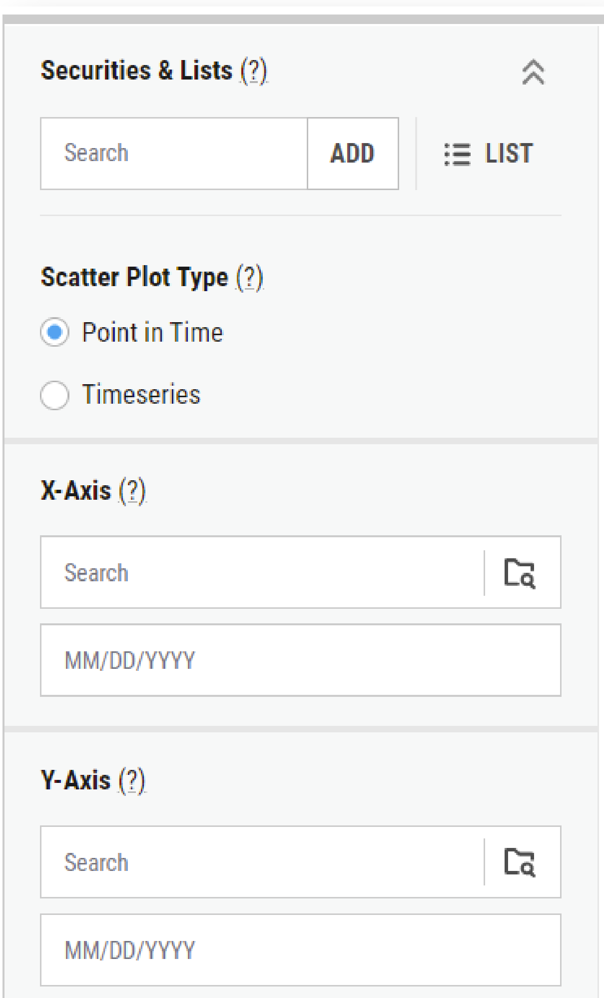
→ **Timeseries:** This shows how the relationship between your selected X-axis and Y-axis metrics has trended over time. You can adjust the time frame and frequency of data to show more or fewer data points on the Scatter Plot.

Overview

5 Within each of the **X-Axis** and **Y-Axis** sections, type in the search bar to identify the financial metrics you'd like to add, or click the **"Browse"** folder icon to access all available metrics by category.

6 Click **"Export"** to download a sharable chart image, export data to a .csv file, and see print options (including Print to PDF).

7 Click **"New Scatter Plot (unsaved)"** to Save and Name your created chart, plus other options.

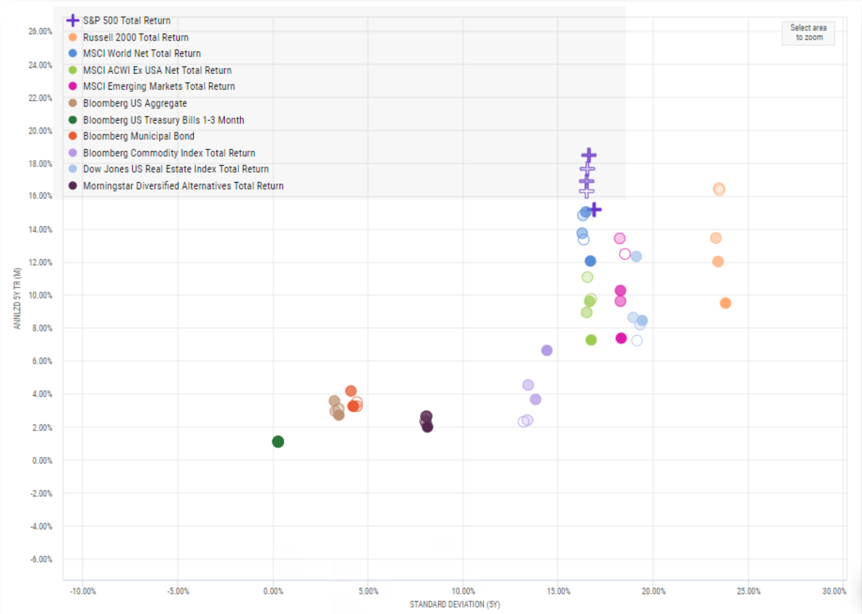


Pre-built Templates

1. Highlight **Tools** in the top banner then select **Scatter Plot** in the dropdown menu.
2. Click **"New Scatter Plot (unsaved)"** then select the first option, **"New from Template"**.
3. Choose from pre-built templates that visualize trends for **Risk/Return**, **Financials, Flows/Return**, and **Timeseries**. Popular templates include:

- **Major Asset Class Breakdown**
- **Major Index Overview**
- **Sector Analysis**
- **Assets vs Liabilities Breakdown**
- **S&P 500 Net Income vs Market Cap**
- **Equity Style Flows vs Performance**
- **Sector Flows vs Performance**
- **Asset Class Analysis**
- **Factor Breakdown**
- **Major Index Comparison**

*Example: the **Asset Class Analysis** template creates a risk vs. reward comparison of major asset class benchmarks over the previous couple of years.*

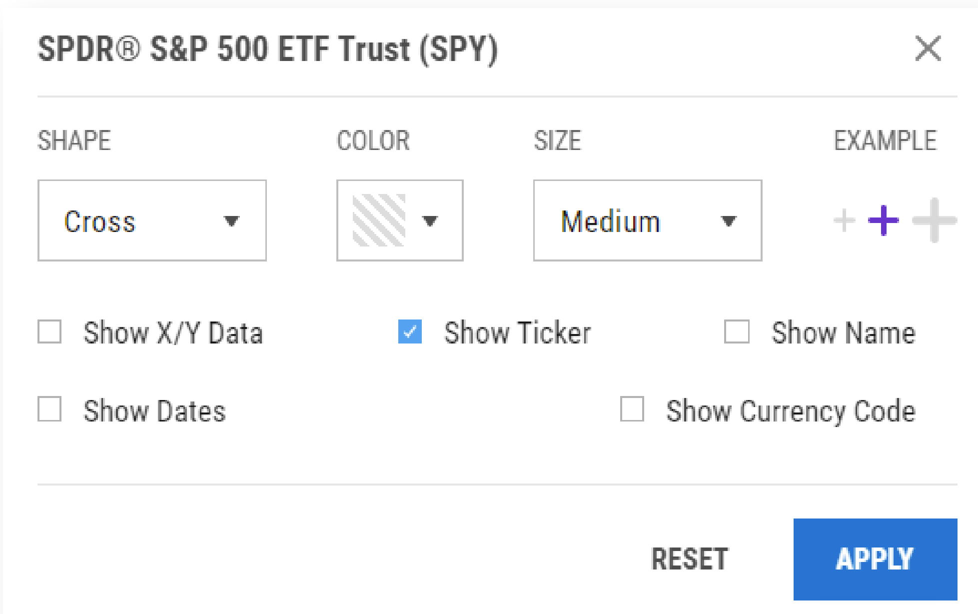


View in Scatter Plot

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

Annotate Your Scatter Plot

1 Once you've created a Scatter Plot, you can customize the individual data points by clicking the **"Cogs"** symbol to the right of the security's name on the left-side panel. A pop-up window will appear providing you options to update a security's shape, color, size, and various display features. Use the various dropdowns and checkboxes to make your selections and hit **"Apply"**.



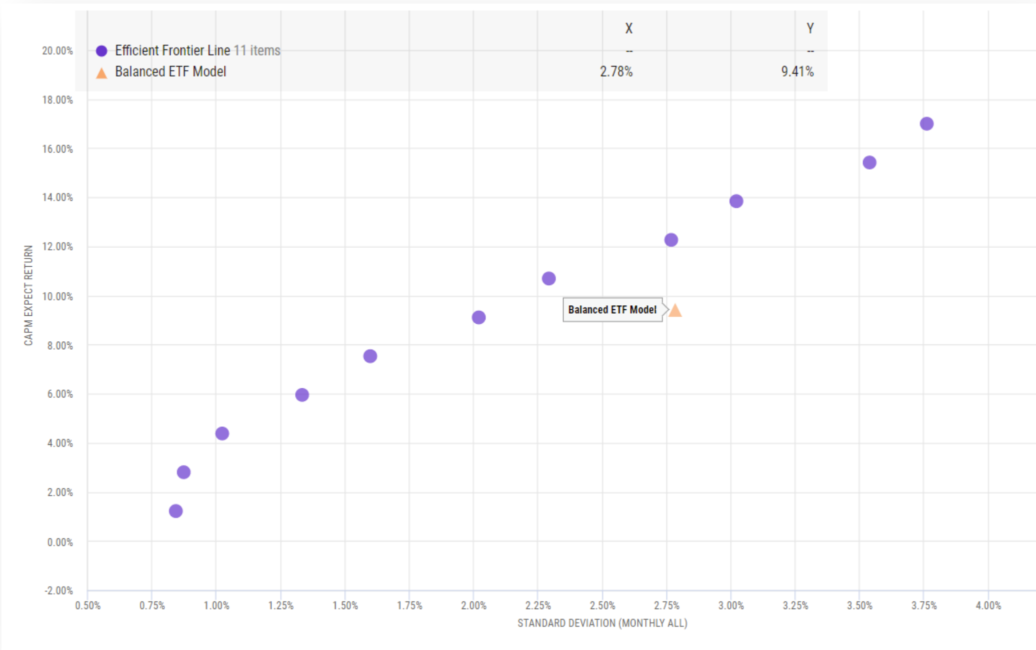
2 Add additional detail using the **Chart Option**s dropdown above the chart including chart legend, currency code, and the X/Y data, among others. Simply click the corresponding checkbox to activate the customization.

Plot an Efficiency Frontier

1 The efficient frontier is a set of optimal portfolios that offer the highest expected return for a defined level of risk. To identify where your portfolios and model strategies lie relative to the efficient frontier, add a series of passive allocation funds along with a portfolio of your choosing.

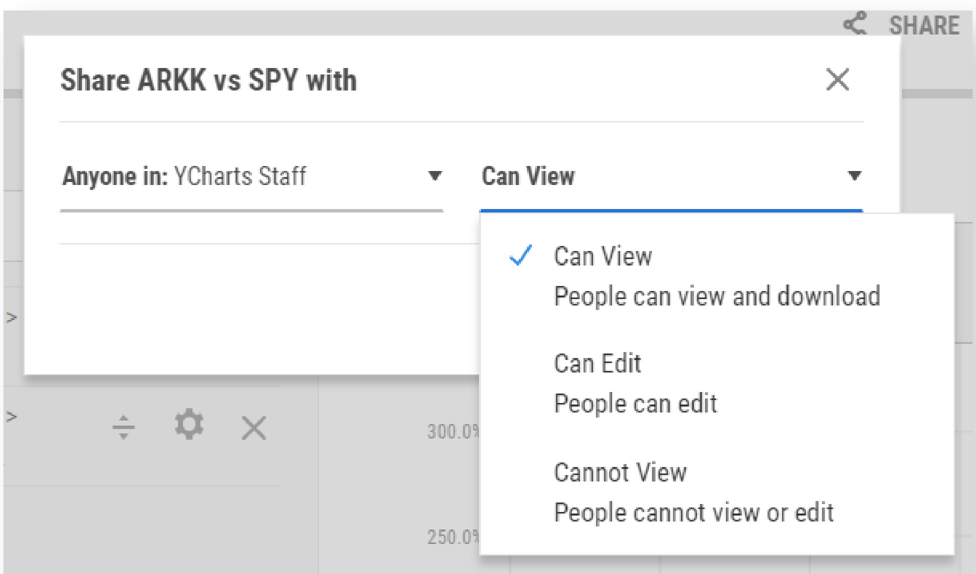
2 For example, use this **set of passive allocation funds** and add any previously created model portfolios to the chart.

3 Customize the added model portfolios (e.g. shape, color) to more readily distinguish between your portfolios and the efficient frontier funds.



Share Scatter Plot

1. Once you've built a **Scatter Plot**, you have the ability to share it with your team by clicking the **"Share"** button at the upper right.
2. Next, click **"Share with Team"** (if your and your colleagues' accounts aren't connected, this option will be grayed out) and a pop-up will appear.
3. Within the pop-up select the **"Anyone in:"** dropdown to designate which groups you would like to share your screen with.
4. In the next dropdown, select between **"Cannot View"** (default), **"Can View"**, and **"Can Edit"** depending on the type of access permissions you want to provide.
5. Once both dropdowns have been configured to your specifications, hit **"OK"**.



6. To retrieve previously shared charts, click **"New Scatter Plot (unsaved)"** in the upper left. Then select the first option, **"Open"**. From there, navigate to the "Shared with Me" tab to view all previously shared charts from your team.

Visualize Real-Life Scenarios

Create visuals that show the impact of withdrawals and contributions to inform better recommendations for your clients. Lightning-fast and easily modified on-the-fly, Scenarios is a powerful and interactive tool to enhance your meetings with clients and prospects.

- Overview
- Scenario Comparisons
- Net Contribution & Withdrawals

Watch Scenarios in Action!

Overview

1 Hover over **Tools** in the top banner then select **Scenarios** in the dropdown menu.

2 Use the **Security & Investment** panel on the left-hand side to add the following info:

- **Security:** type to search for a security, model portfolio, or index.
- **Compare To:** select whether a Benchmark, Other Security, or a previously Saved Scenario is shown alongside your initial security selection.
- **Start Date** and **End Date:** select the total time frame over which the investment scenario should take place using the MM/DD/YYYY date format. This represents the total time frame used in the chart and table.
- **Initial Investment:** enter a value greater than zero to serve as the basis of all Scenarios added next.

3 Click **"+Add a Scenario"** to create a specific contribution or withdrawal schedule. Use the following inputs to build your desired visual:

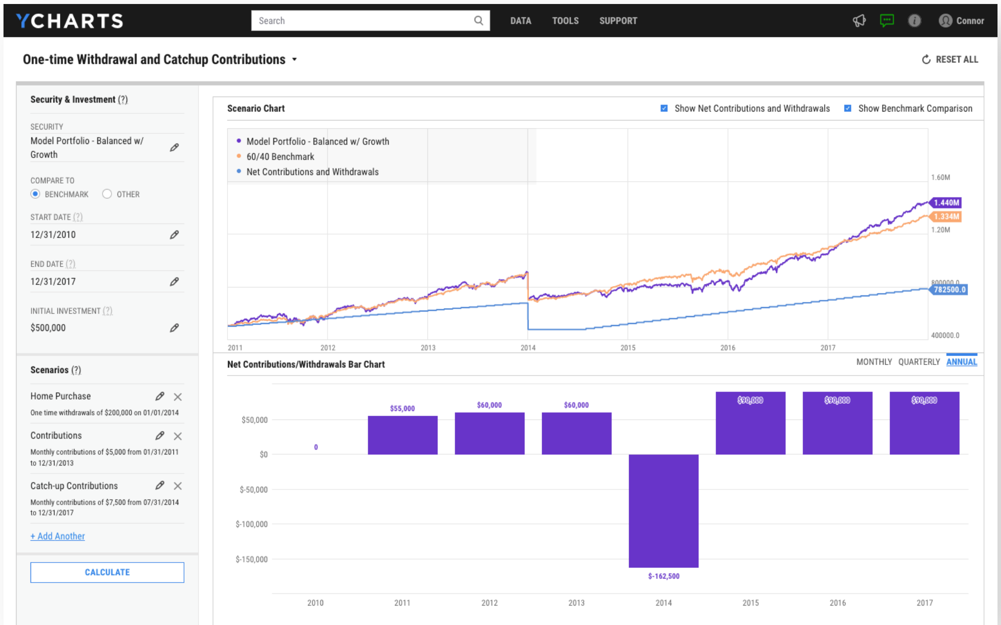
- **Scenario Name:** choose a name to assign to this Scenario and stay organized.
- **Type:** select between **"Withdrawal"** or **"Contribution".**
- **Data Type:** choose between **"Percentage"** (to contribute or withdraw a percentage of the investment's value at a point in time) or **"Value"** (to contribute or withdraw a dollar amount at a point in time).
- **Value:** enter a specific percentage or value to be contributed/withdrawn.
- **Frequency:** Choose from **"Monthly"**, **"Quarterly"**, **"Semi Annual"**, **"Annually"**, or **"One Time"**
- **Rate of Change (optional)**: select the "Rate of Change" checkbox. Choose between "Percentage" or "Value" from the "Rate of Change Data Type" dropdown. Enter the "Rate of Change Value" you want applied. Lastly, select the frequency in which you want this change to be made from the "Rate of Change Frequency" dropdown (**"Monthly"**, **"Quarterly"**, **"Semi Annual"**, or **"Annually"**).
- **Start Date** and **End Date:** select the isolated time frame over which contributions or withdrawals will be made using the MM/DD/YYYY date format (not applicable for "One Time" frequency option).

Overview

4 Click **"Add"** once complete to populate the chart and data table.

5 Repeat Step 3 to add additional withdrawal or contribution scenarios. Click **"Calculate"** to add each repetition.

6 To save a scenario, click **"Scenario Builder (unsaved)"** in the top left and click **"Save as..."**. Enter a name and click **"Save"**.

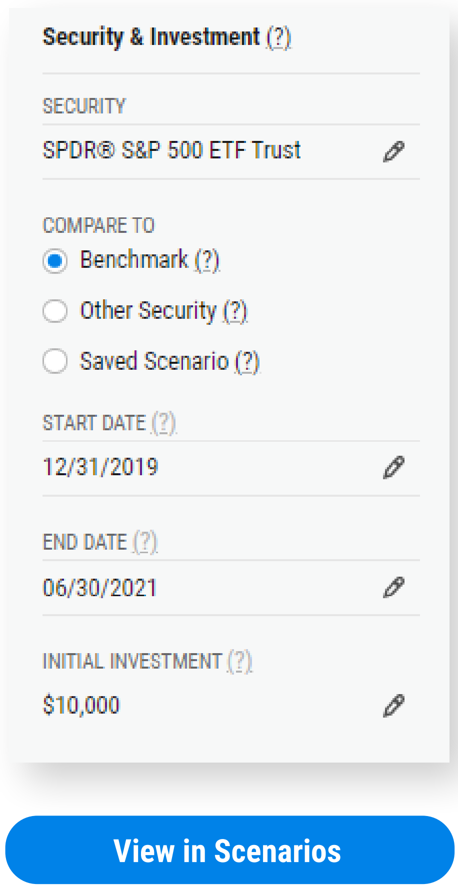


View in Scenarios

Scenario Comparisons

1 By default, Scenarios are compared against the preset or user-defined benchmark for the selected security. Alternative comparisons can be created by selecting **“Other Security”** or **“Saved Scenario”** in the **Compare To** field.

2 For **“Other Security”** comparisons, use the **“Compare Security”** field to search for the security, model portfolio, or index you’d like to use.



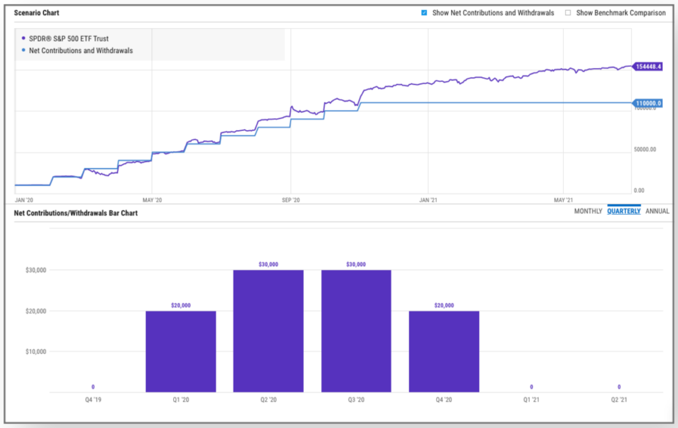
3 For **“Saved Scenario”** comparisons, click “+Add Saved Scenario” and select a previously saved scenario from either the **My Scenarios** or **Shared with Me** tab.

4 In the **Scenario Chart** module, check (or uncheck) the box for **“Show Security Comparison”** to add or remove the designated comparison dataset.

Net Contributions & Withdrawals

1 In the **Scenario Chart** module, check (or uncheck) the box for **"Show Net Contributions and Withdrawals"** to add or remove those series.

2 In the **Net Contributions/Withdrawals Bar Chart** module, change the periodicity of each column by choosing between **"Monthly"**, **"Quarterly"**, and **"Annual"**.



View in Scenarios

3 Similarly, in the **Contribution Table** module, change the periodicity by choosing between **"Monthly"**, **"Quarterly"**, and **"Annual"** in the upper-right corner.

Contributions Table — MONTHLY QUARTERLY ANNUAL

YEAR	STARTING VALUE	NET CONTRIB.	END VALUE	TOTAL RETURN W/ NET CONTRIB.	TOTAL RETURN W/O NET CONTRIB.	TOTAL CONTRIBUTED
2010	$100,000.00	$12,000.00	$128,725.78	28.73%	15.06%	$112,000.00
2011	$128,725.78	$12,000.00	$143,091.16	11.16%	1.89%	$124,000.00
2012	$143,091.16	$12,000.00	$178,620.00	24.83%	15.99%	$136,000.00
2013	$178,620.00	$12,000.00	$250,267.32	40.11%	32.31%	$148,000.00
2014	$250,267.32	$12,000.00	$296,943.81	18.65%	13.46%	$160,000.00
2015	$296,943.81	$12,000.00	$312,749.80	5.32%	1.25%	$172,000.00
2016	$312,749.80	$12,000.00	$363,325.82	16.17%	12.00%	$184,000.00
2017	$363,325.82	$12,000.00	$455,558.18	25.39%	21.70%	$196,000.00
2018	$455,558.18	$12,000.00	$445,854.74	-2.13%	-4.56%	$208,000.00
2019	$445,854.74	$12,000.00	$598,710.46	34.28%	31.22%	$220,000.00
2020	$598,710.46	$12,000.00	$723,148.23	20.78%	18.37%	$232,000.00
2021	$723,148.23	$12,000.00	$944,833.22	30.66%	28.75%	$244,000.00
Total	$100,000.00	$244,000.00	$944,833.22	844.83%	437.71%	$244,000.00

Viewing 1-12 of 12 | FIRST | PREV | NEXT | LAST

View in Scenarios

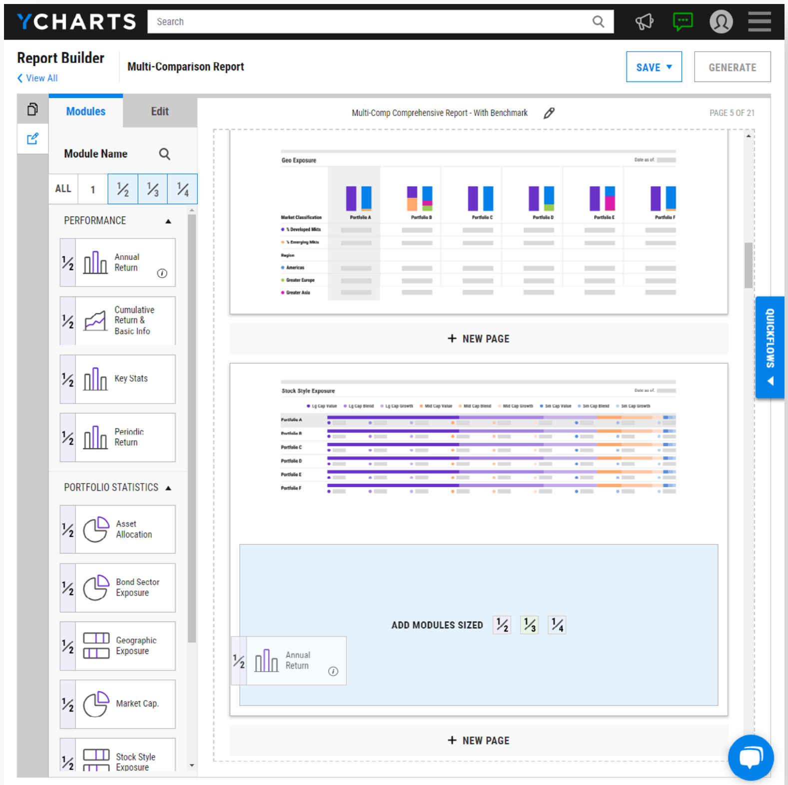
Customize the Ideal Report with Report Builder

Save time and effort by utilizing Report Builder's intuitive, drag-and-drop designer to create tailored reports for client, prospect, or internal meetings. Utilize over 30+ customizable visual and data modules, your firm's branding and disclosures, and even external PDF or PNG files to create the ideal collateral for every conversation.

- Overview
- Pre-built Templates
- Share a Report
- Duplicate a Report
- Filter for a PDF Report

See Report Builder in Action!

Overview



View in Report Builder

1. Hover over **Tools** and click **"Report Builder"** in the dropdown menu.

2. Click **"+Create New"** in the upper-right corner to create a new PDF Report, either a pre-built template or from scratch.

3. Next, click **"+Create New"** in the middle of the screen. Select **"Blank Custom Report Template"**.

4. Fill in the fields for **Report Template Name** and **Report Template Description (Optional)**.

5. For **Report Template Type**, choose between **"Overview"**, **"Comparison"**, and **"Multi-Comparison"**. Each report also includes the option to **"Include Benchmark"**. Click **"Submit"** once all selections are made.

→ **NOTE:** You will be able to edit the Report Template's **Name** and **Description** at a later date, but not the Template **Type**.

Overview

6 In the left panel, use the **"Page View"** and **"Page Edits"** icons to toggle between those menus.

→ **Page View:** Click the three icons above the numbered page(s) to Add a Page, Duplicate, or Delete. Click the numbered pages to navigate throughout the Report Template.

→ **Page Editor:** Click the Magnifying Glass to search for modules by name, or filter all modules by size the "1", "1/2", "1/3", or "1/4" page tiles.

7 Add a module to the report by dragging and dropping it onto the desired page.

8 Some modules allow for further customization of the specific metrics they will include. To edit, click on the report module within the preview and use the left panel to search for and reorganize metrics. (If customizations are not available for a module, nothing will appear in the left panel.)

9 To delete a module, click it within the preview, then click **"Delete Module"** in the left panel.

10 Once satisfied with the report you've created, click **"Save"** in the upper-right, then select **"Save"** or **"Save As"**.

11 Click **"Generate"** at the top right of the page to check your work as you go (only after saving at least once) or to choose securities and generate a PDF Report using this template.

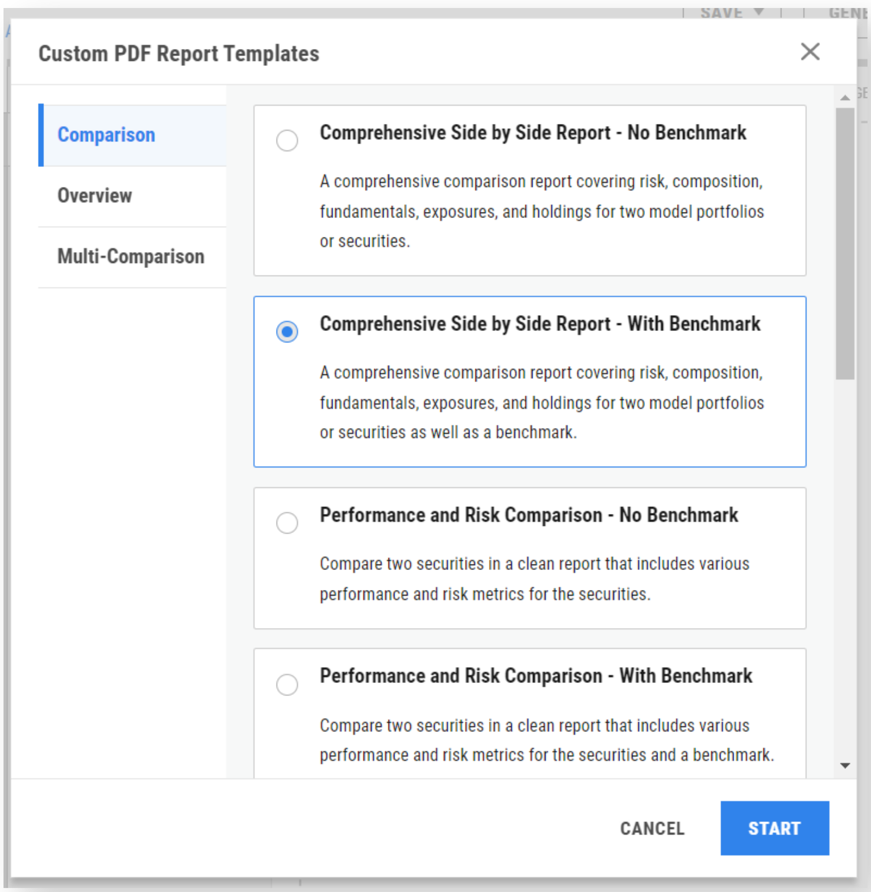
Pre-built Templates

1 To utilize pre-built report templates, click **“+Create New”** at the top of the Report Templates List view.

2 Next, click **“+Create New”** in the middle of the screen and select **“New From YCharts Template”.**

3 Select a template from the **Comparison, Overview**, or **Multi-Comparison** tabs and then click **“Start”**.

4 Follow steps 6 - 11 from the Report Builder Overview section to build out your report.

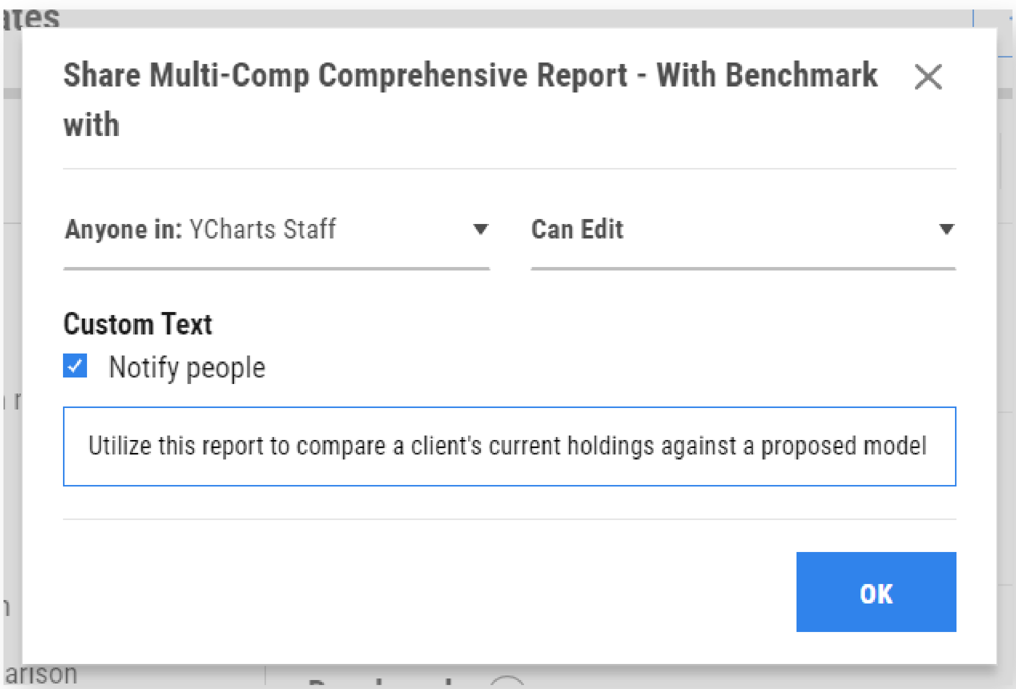


View in Report Builder

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

Share Reports

1. On the **Report** Templates page, click **"More Options"** (three stacked dots button) for the Template you wish to share, then click **"Share"** in the dropdown menu.
2. A pop-up will appear. Use the **"Anyone in:"** dropdown to select a Share Group, assign **"Cannot View"** (default), **"Can View"**, and **"Can Edit"** permissions, and include a note.
3. Check **Notify People** to alert them via email of the shared asset.
4. Click **"OK"** to share.



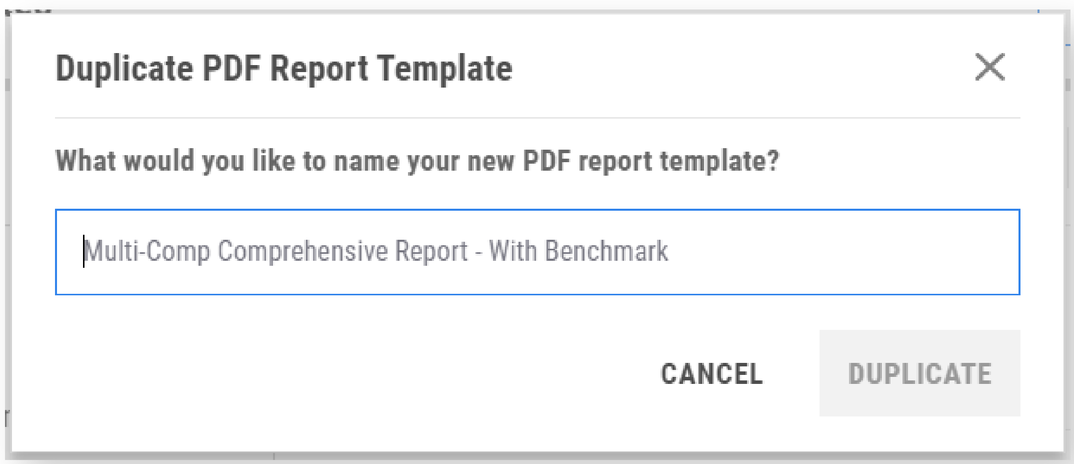
View in Report Builder

Duplicate a Report

1 On the **Report Builder** page, click **“More Options”** (the three stacked dots button) then click **“Duplicate”** in the dropdown menu.

2 Assign a name to the new template then click **“Duplicate”**.

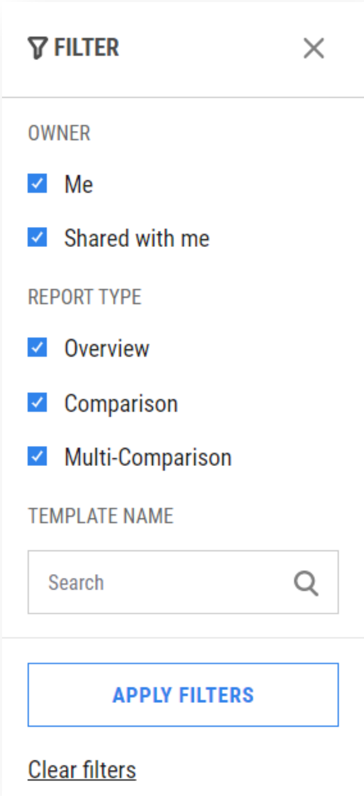
3 Update and edit the duplicate template as you see fit. Click **“Save”** once complete.



View in Report Builder

Filter for a Report

1. From the Report Templates page, use the **Filter** side panel on the left to locate specific reports that you've previously created or have been shared with you.
2. Filter by **Owner** by checking or unchecking "Me" or "Shared with me".
3. Select a **Report Type** to filter for "Overview", "Comparison", and "Multi-Comparison" reports.
4. Search for a report in the **Template Name** field and type search terms for previously created reports.
5. Click **"Apply Filters"** to apply all noted criterias.



View in Report Builder

Build A Model Portfolio

YCharts' Model Portfolios tool gives advisors an intuitive and powerful means for constructing, testing, and tracking the performance of any investment strategy or basket of securities. Model Portfolios give you in-depth data and visuals for any basket of securities, making it the perfect tool for testing new investment ideas and adjusting strategies on the fly.

- Upload and Create Portfolios
- Dynamic Model Portfolios
- Build Portfolio Sleeves
- Custom Benchmarks
- Pre-built Templates
- Filter for a Portfolio
- More with Model Portfolios
- Share Model Portfolios
- Integrate Partner Portfolio Holdings

See Model Portfolios in Action!

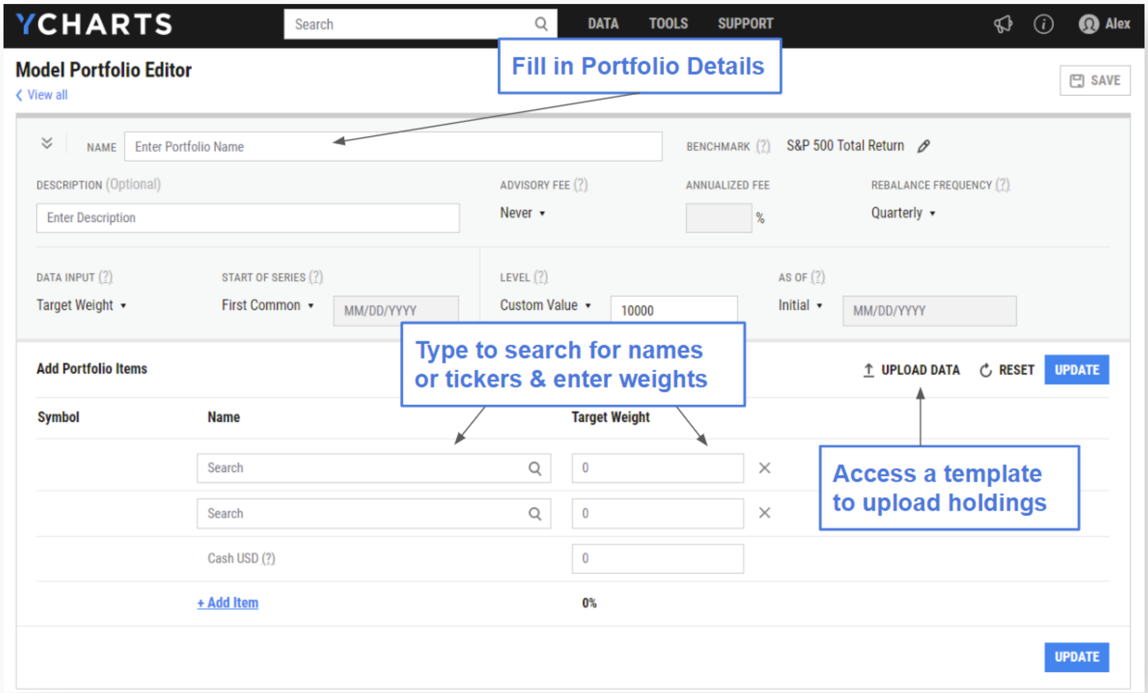
Upload and Create Portfolios

1 Click **Tools** in the top banner then select **Model Portfolios** in the dropdown menu.

2 From the **Model Portfolios List** page, click **"Create"** then **"Blank Model Portfolio"** in the upper-right corner.

3 Add your Portfolio details — select a Name, Description, Advisory Fee (if applicable), Benchmark, Start of Series History, Initial Series Level, and Rebalancing Period.

4 Upload or type in your holdings — click **"Upload Data"** to add a .csv of your portfolio holdings and percent weights, or type to search for each ticker and enter weightings under **"Add Portfolio Items"**.



Build a Model Portfolio

Dashboard
Fundamental Charts
Scatter Plot
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Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

Dynamic Model Portfolios

1 In Model Portfolios, click **"Create"** in the upper right corner, select **"Blank Dynamic Model Portfolio"**. (Existing static Model Portfolios cannot be converted to Dynamic Model Portfolios.)

2 Give your portfolio a Name and Description, then select your Advisory Fee (if applicable), Benchmark, Rebalance Frequency, and Initial Level.

3 Click **"Upload Data"** under "Get Started", then click to browse files on your computer or drag and drop your holdings file (either .xlsx or .csv formats) into the designated area. Here, you can also click **"Download Our Template"** to access a blank Excel workbook that already meets formatting requirements.

Get Started.

Upload Data from a .XLSX or .CSV File

Examples of accepted 'Date', 'Symbol' and 'Target Weight'

EXAMPLE_DYNAMIC_MODEL_PORTFOLIO_HOLDINGS.CSV

Date	Symbol	Target Weight
01/01/2018	AAPL	0.5
01/01/2018	MSFT	0.5
01/01/2019	NFLX	0.25
01/01/2019	AMZN	0.75

Build a Model Portfolio

4 A green check mark and the message "Your file is in the correct format" will appear when your portfolio holdings have been uploaded successfully. (If not in the correct format, YCharts will prompt you to amend the file and try again. Notably, the "Target Weight" column must be a decimal—up to 4 decimal places—or percentage, and sum to 1.00 or 100% for each date column period, respectively.)

5 Click **"Submit"** and review your historical holdings and positions in the table.

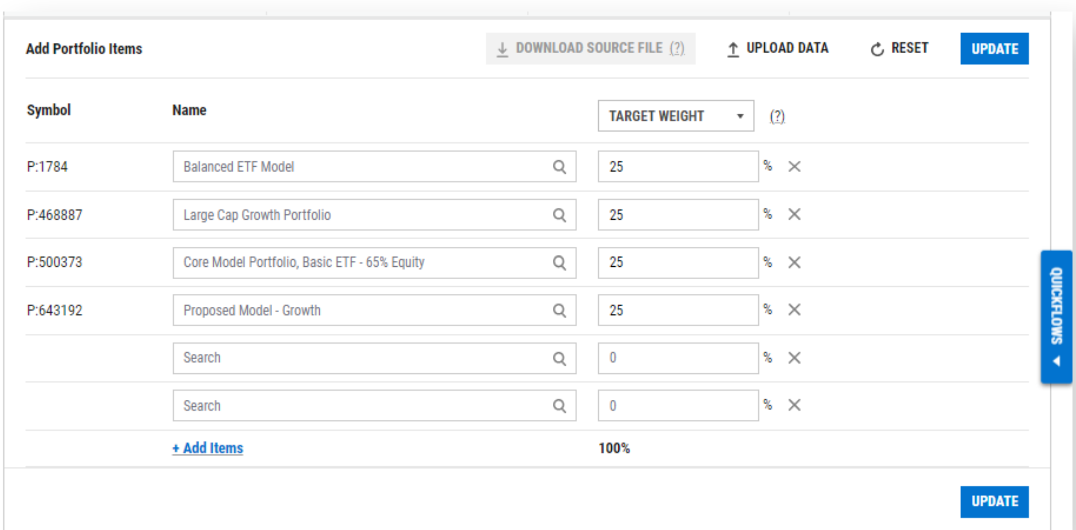
6 Click **"Save"** in the upper right corner. Your portfolio may take a few minutes to calculate.

Build Portfolio Sleeves

1 Portfolio “sleeves” are used as building blocks to create client or model portfolios by adjusting allocations to individual sleeves. To create portfolio sleeves in YCharts, start by building the individual sleeves through the Model Portfolios tool, just **as you would for any portfolio**.

2 Once your sleeve(s) are built, create the overall portfolio by calling on the sleeves as holdings, type-searching for the sleeve names you set as you would any other security.

3 Click **“Update”** once you’ve all portfolio sleeves have been added and respective weights have been selected.



Build a Portfolio Sleeve

Custom Benchmarks

1 Custom (or blended) benchmarks are managed within YCharts Model Portfolios. Start by creating **a new Model Portfolio** in YCharts and select as its holdings the indices, funds, or other securities that will make up your blended benchmark (e.g. a 60% S&P 500, 40% US Aggregate Bond benchmark, etc.). We recommend clients use ETFs for custom benchmark creation. Also, make sure to update the **"Advisory Fees"** dropdown to **"Never"** as a best practice when creating custom benchmarks.

2 To associate your Model Portfolio(s) with the custom benchmark, navigate to the **Model Portfolios** list view and click the **"Pencil"** icon to update the portfolio of choice.

3 In the "Model Portfolio Editor" navigate to the "Benchmark" section and click the **"Pencil"** icon to update.

4 Search for the custom benchmark you created within the "Model Portfolios" section of the search results. Select the benchmark by clicking its name.

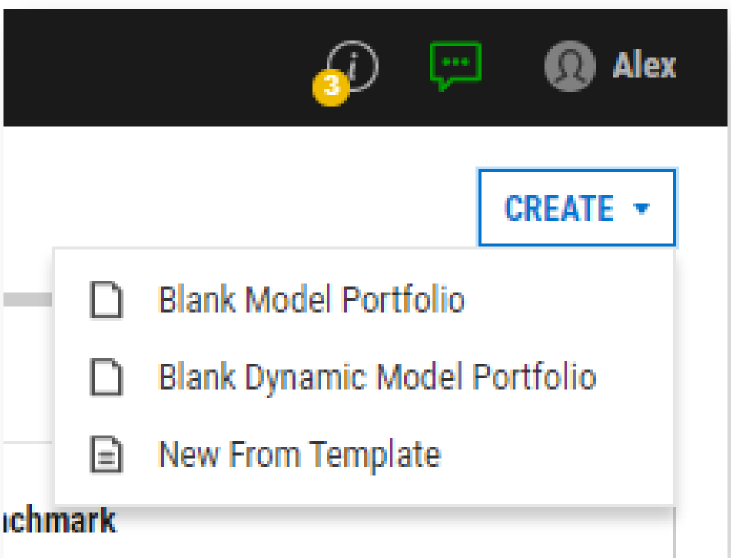
5 Hit **"Save"** in the upper right corner once complete to refresh the portfolio.

Pre-built Templates

1 Highlight Tools in the top banner then select **Model Portfolios** in the dropdown menu.

2 From the defaulted Model Portfolios page, click **"Create"** then select the third option, **"New from Template"**.

3 Choose from categories like **ETF Benchmark Models**, **Index Model Portfolios**, and **Specialty Portfolios** to see all available pre-built screens.



Build a Model Portfolio

Filter for a Portfolio

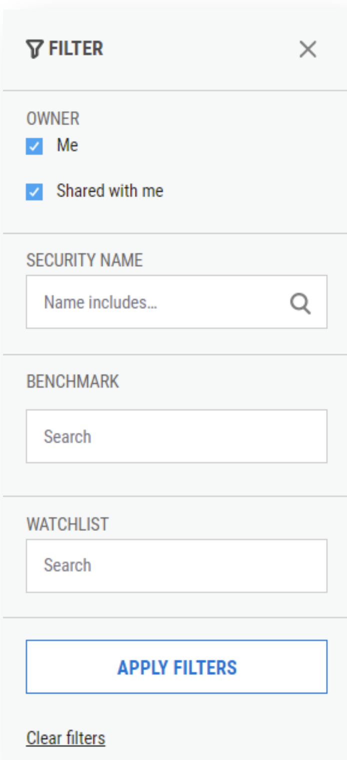
1 From the **Model Portfolios** page, use the **Filter** side panel on the left to locate specific data sets you've uploaded.

2 Filter for **Owner** by checking or unchecking "Me" or "Shared with me".

3 Search for **Portfolio Name** and type search terms for previously created portfolio names.

4 Utilize the **Benchmark** criteria to filter by the index against which your portfolio's risk metrics are calculated (e.g. S&P 500, Russell 2000).

5 Filter using the **Watchlist** criteria to filter by inclusion in any of your saved Watchlists.



Build a Model Portfolio

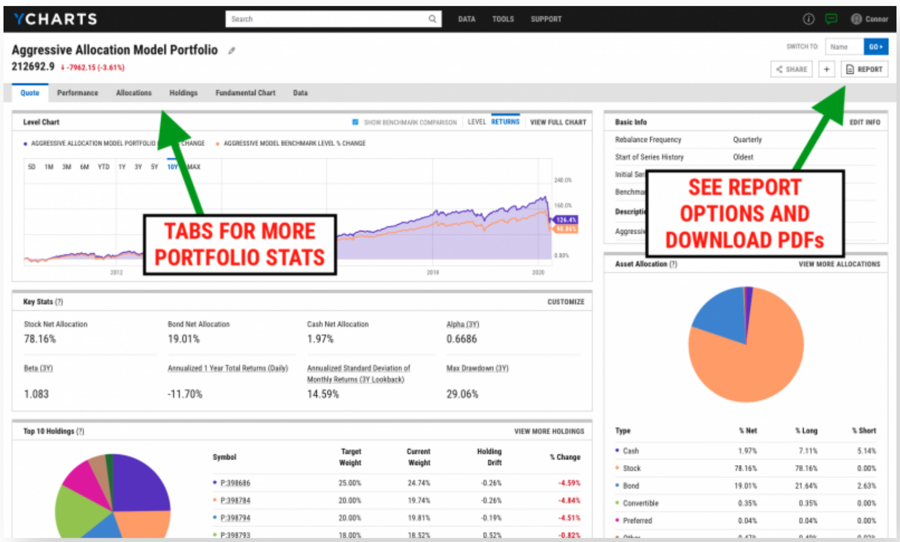
More with Model Portfolios

1 After creating a model portfolio, click the **"Down Arrow"** to the right of the portfolio name and click **"Overview & Stats"** to navigate to their specific quote page. Alternatively, simply click on the portfolio name.

2 From any Model Portfolio Quote Page, click the **"Performance"** and **"Allocations"** tabs to dig deeper into period returns, sector and fixed income exposures, and other portfolio-level statistics.

3 Click the "**Holdings**" tab to get a list of all current holdings sorted by Target Weight. For the "**Holdings Overlap**" tab, view the pass-through information for company and individual fixed income exposure for any mutual fund and ETF positions (along with regular Equity).

4 Click **"Report"** in the upper-right of a Model Portfolio Quote Page to generate customizable Overview and Comparison FINRA-reviewed PDF reports to get a breakdown of your portfolio's performance and stats. For more firm-tailored materials, customize Portfolio Reports with your firm's colors, logo, disclosures, and more by navigating to **Report Branding**.



Build a Model Portfolio

Share Model Portfolios

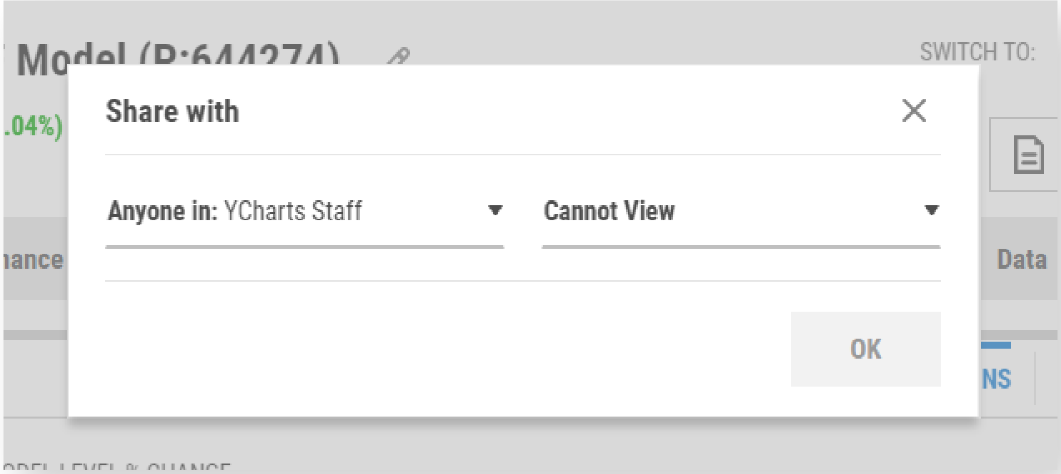
1 Once you've constructed a portfolio within **Model Portfolios**, share it with their teams. First, navigate to the specific portfolio's quote page.

2 Then click the **connected nodes** button in the upper right of the screen and directly left of the "Reports" button.

3 A pop-up will appear. Select the **"Anyone in:"** dropdown to designate which groups you would like to share your screen with.

4 In the next dropdown, select between **"Cannot View"** (defaulted), **"Can View"**, and "Can Edit" depending on the type of access permissions you want to provide.

5 Once both dropdowns have been configured to your specifications, hit **"OK"**



6 To retrieve previously shared model portfolios, refer to the "Filter for a Portfolio" section. You will be able to find any shared model portfolios at the **Model Portfolios** main page.

Integrate Partner Portfolio Holdings

1. To set up a portfolio holdings integration, which allows you to pull data from your portfolio accounting and CRM tools into YCharts, start by highlighting "Support" in the top banner then select **Integrations** in the dropdown menu.

2. If your "Status" for the partner platform of interest is "Active", skip to step 4. If it is "Inactive", click the **"Manage"** dropdown and then click **"Activate"**.

3. A pop-up will appear, prompting you to log in to your account with the partner's integrated platform. Log in using your username and password associated with that platform, not YCharts. Note that you may be redirected to the partner's site where you will need to allow YCharts to link your two accounts. Once linked successfully, your status will change to "Active".

4. Next, navigate to **Model Portfolios** by hovering over "Tools" in the top banner then select **"Model Portfolios"**.

5. In the upper right-hand corner of the page, click on the **"Import Holdings"** dropdown. Select from the platforms you've integrated.

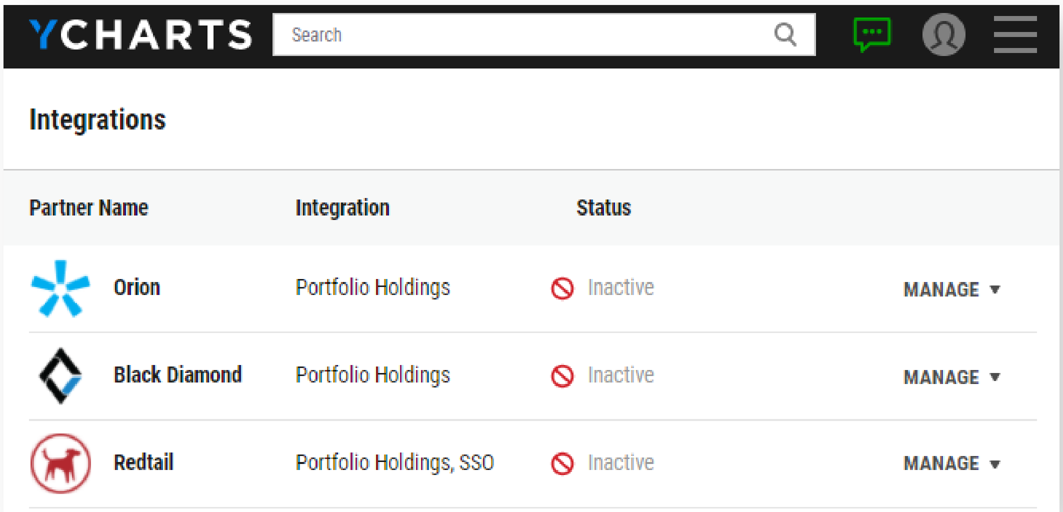
6. A pop-up will appear prompting you to search for portfolio holdings. Depending on the integrated platform, toggle the "Search By" dropdown for additional options.

7. In the search field, type in a keyword and click **"Submit"**. All the search results that meet the search criteria will appear. Select the account/portfolio of choice (a checkmark should appear to the right confirming the selection) and click **"Import"**.

Integrate Partner Portfolio Holdings

8 You will be redirected to the “Model Portfolio Editor” loaded with the portfolio holdings and weights from the account/portfolio that was imported. Update the portfolio’s “Name”, “Description”, ”Benchmark”, etc. similar to how you would when creating a model portfolio in YCharts, outlined in the **Upload and Create Portfolios** section of this guide. Click **“Save”** once completed.

9 Once the portfolio has been processed, view the portfolio’s quote page as you would any other security and utilize it in any of YCharts’ other tools like you would any other model portfolio created in YCharts.



Activate Partner Integrations

Explore the Stock & Fund Screener

The Stock & Fund Screeners narrow YCharts' expansive equity and fund universe of over 20,000 North American stocks and 40,000 funds & ETFs to identify the ways your fund family stands out. The qualitative and quantitative filters enable you to build data-driven sales strategies and better position your offerings to clients. The YCharts Screeners' ease-of-use allows you to pre-build screens, present them when meeting with clients, and add additional filters on the fly to ensure conversations stay productive.

- Overview
- Pre-built Templates
- Create Scoring Models
- Set Alerts
- Pin Securities
- Share Screens

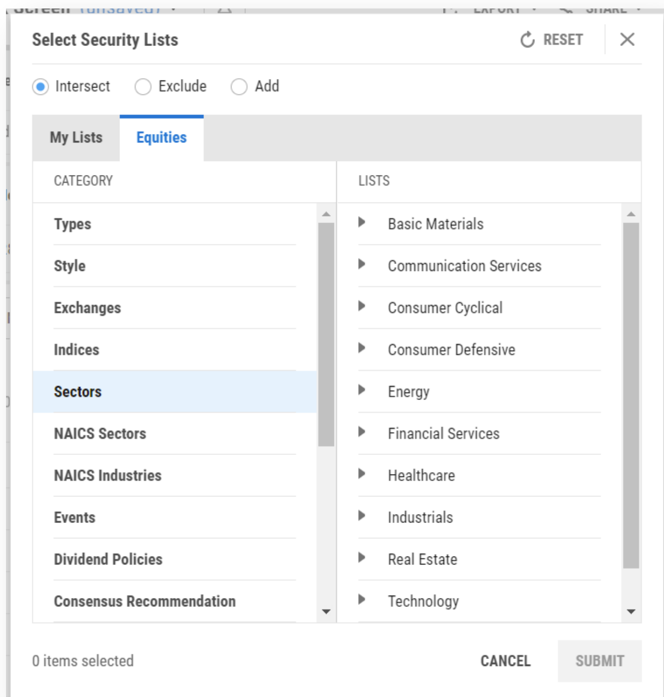
Watch the Stock Screener in Action!

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

Overview

1 Highlight **Tools** in the top banner then select either the **Stock Screener** or **Fund Screener** in the dropdown menu.

2 Use the **"MODIFY"** button to define a universe of funds based on qualitative information such as equity style, sectors, fund category, brokerage availability, and more.

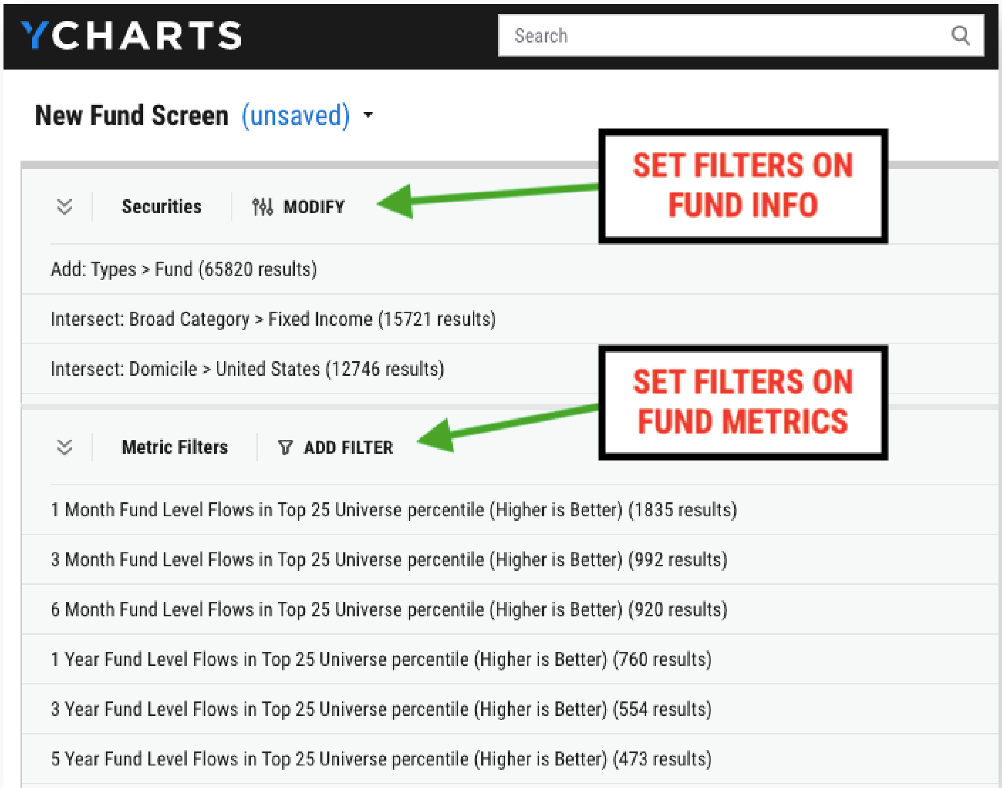


View in the YCharts Stock Screener

3 Use the **"ADD FILTER"** button in the **"Metric Filters"** section to narrow the universe of securities based on quantitative metrics like performance, asset flows, or risk.

4 Once the **"Create a Metric Filter"** module opens, select from **Range**, **Equation**, **Percentile**, or **Rank** filters then type to search for a fund metric or click **"Browse"** to see all available options.

Overview



View in the YCharts Stock Screener

5. Click the "**Remove Duplicates**" checkbox to filter for the fund share class with the most assets under management (Fund Screener) or the equity share with more trading volume (Stock Screener) when multiple are present.

6. Click **"New Stock (or Fund) Screen (unsaved)"** to Save or Name your screen, plus other options.

7. Also, hit **"Share"** in the upper right to share with your team.

8. Specifically for the **Fund Screener**, to enable the **Security Exposure Filters** (section located below "Metric Filters"), click **"ADD FILTER"**. Select between "Include" or "Exclude" funds that match the noted security criteria. Search for a security's name or ticker (e.g. AAPL), select between "Greater than..." or "Less than...", and add a value threshold for a percentage or position.

Pre-built Templates

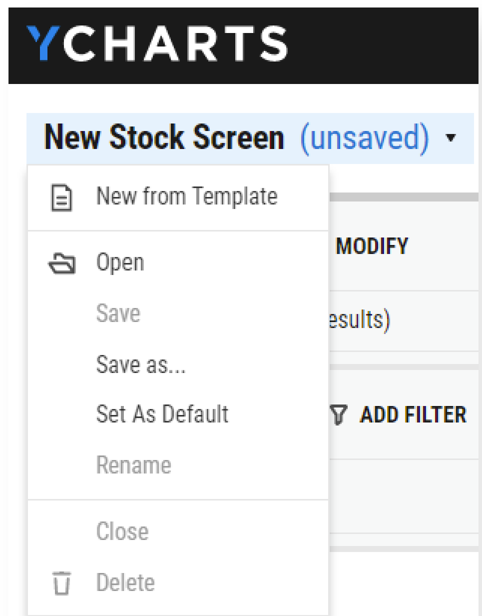
1. Highlight Tools in the top banner then select either the **Stock Screener** or **Fund Screener** in the dropdown menu.

2. From the Fund Screener, click **"New Stock (or Fund) Screen (unsaved)"** then select the first option, **"New from Template"**.

3. Choose from a variety of categories to see all available pre-built screens. The most popular screens include:

Stock Screener:

- **EPS Growth Over Time**
- **Momentum Stocks**
- **Attractive Relative Metrics Against the Market**(options for **industry** and **sector** also available)
- **Benjamin Graham Value Stocks**
- **Joel Greenblatt Value Screen**
- **Golden Cross**
- **REITs**
- **Blue Chip Earnings**
- **Recent Negative** (or **Positive**) IPOs"



Visit the YCharts Stock Screener

Fund Screener

- **Best Performing Actively Managed Emerging Markets Funds**
- **Best Performing Large Cap Funds** (also **Small/Mid Cap Funds** available)
- **Most Asset Inflows** (or **Outflows**)
- **Recession Friendly Funds**
- **Best Performing Growth ETFs**
- **Best Performing Value ETFs**
- **Top Performing Dividend ETFs**
- **Best Performing Tax-preferred Bond Funds**
- **Growth** (or **Value)** SMAs"

Create Scoring Models

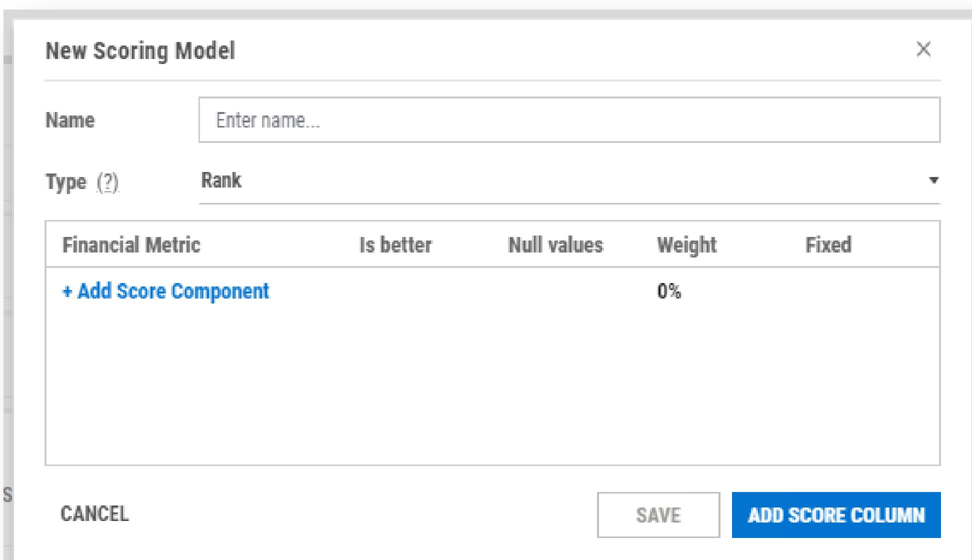
1 Build customized Scoring Models to objectively rank funds based on assigned weights and financial metrics. Click the **"Scoring Models"** dropdown, then **"+Create new scoring model"**.

2 Enter in the "Name" and "Type", then click **"+Add Score Component"**. Add the financial metrics you want to rank your securities for by searching for or selecting them using the category filters. Hit **"SUBMIT"** when complete.

3 Update for "Is better", treatment of "Null values", and percentage weight.
→ *Unchecking "Fixed" will automatically calculate and evenly distribute weights across all metrics that weren't explicitly dictated.*

4 Once all weights sum to 100%, click **"Add Score Column"** to apply. Hit **"Save"** to use at a later time.

5 To reference a previously saved model, click the **"Scoring Models"** dropdown then **"Open saved model"**.

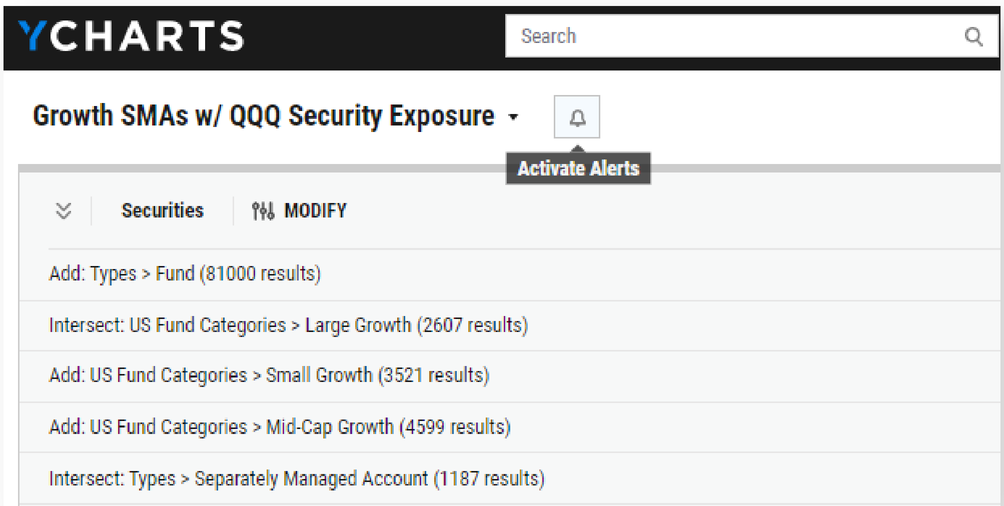


Click to create a Scoring Model

Set Alerts

1 To set an alert for a stock or fund screener, first create and save a screen to your account. Alternatively, you can open a previously created screen.

2 From there, click the **"Activate Alerts"** bell icon directly right of the screen's name to set alerts on screens you've built. YCharts will notify you any time a security enters or exits your screen criteria.



Visit the YCharts Fund Screener

Pin Securities

1 To pin securities to the top of either Screener's results list, click the **pin icon** directly to the right of the security's ticker symbol. This will ensure securities of interest are always in view even while scrolling through the full list.

Results

1-50 of 68 Equities | FIRST | PREV | **NEXT** | **LAST**

SCORING MO

Symbol	Name	Price	50-Day Simple Moving Average	200-Day Simple Moving Average	52 Week High (Daily)	52 Week Low (Daily)
CABA	Cabaletta Bio Inc	11.92	7.848	2.977	12.48	0.59
ARDX	Ardelyx Inc	3.01	2.41	1.325	3.43	0.4902
YPF	YPF SA	11.75	9.249	6.183	13.11	2.82
NINE	Nine Energy Service Inc	14.05	11.82	5.601	17.10	1.04
IMVT	Immunovant Inc	18.20	16.28	8.518	20.24	3.145
GLYC	GlycoMimetics Inc	3.09	2.529	1.176	3.60	0.51
AKRO	Akero Therapeutics Inc	49.23	46.32	25.90	54.88	7.52
NVCN	Neovasc Inc	28.00	15.86	8.935	28.28	4.585
VRNA	Verona Pharma PLC	20.80	18.85	10.44	26.44	3.408
ATXS	Astria Therapeutics Inc	13.36	12.67	7.979	16.28	2.36
ETNB	89bio Inc	12.05	10.36	6.211	12.95	2.00
IPDN	Professional Diversity Network Inc	5.29	2.440	1.837	5.30	0.9202

Visit the YCharts Fund Screener

Share Screens

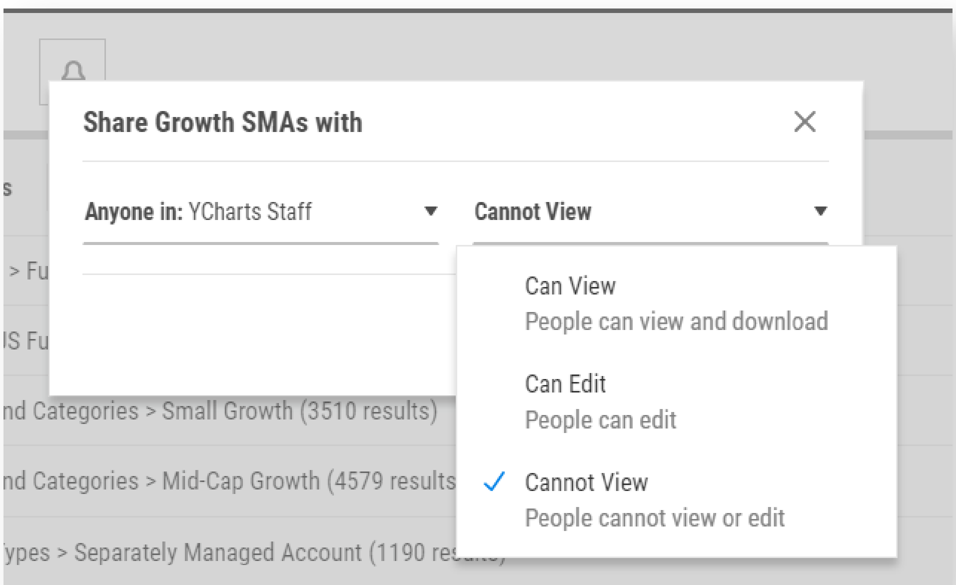
1 Once you've built a **Stock Screen** (or **Fund Screen**), share it with their teams by clicking the **"Share**" button at the upper right.

2 Next, click **"Share with Team"** (if your and your colleagues' accounts aren't connected, this option will be grayed out) and a pop-up will appear.

3 Within the pop-up select the **"Anyone in:"** dropdown to designate which groups you would like to share your screen with.

4 In the next dropdown, select between **"Cannot View"** (defaulted), **"Can View"**, and **"Can Edit"** depending on the type of access permissions you want to provide.

5 Once both dropdowns have been configured to your specifications, hit **"OK"**.



6 To retrieve previously shared screens, click **"New Stock (or Fund) Screen (unsaved)"** in the upper left. Then select the second option, **"Open"**. From there, navigate to the "Shared with Me" tab to view all previously shared screens from your team.

Perform Head-to-Head Comparisons with Comp Tables

Perform comparative analyses pitting your funds against the competition to identify your fund's strengths and weaknesses by evaluating them on over 4,000 financial metrics. Align everyone on your team, ensuring similar messaging and points of emphasis when meeting with clients and prospects.

- Overview
- Pre-built Templates
- Create Scoring Models
- Generate Reports
- Custom Return Periods
- Pin Securities & Summary Stats
- Share Data Tables

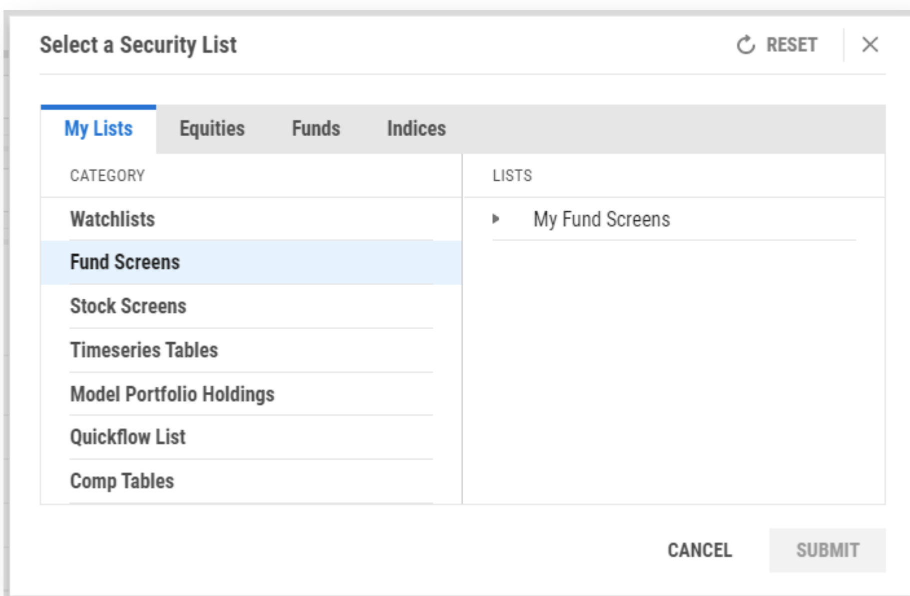
See Comp Tables in Action!

Overview

1 Highlight **Tools** in the top banner then select **Comp Tables** in the dropdown menu.

2 In the **Securities & Lists** section, you have a few options to build out a list of comparables.

- → To use a previously built list, click on the **"LISTS"** button and navigate to the "My Lists" tab. Select a previously built **Watchlist**, a list created within a **Screener**, or even holdings from a **Model Portfolio**.
- → To enter each fund name or ticker individually, type each one that you want to compare — suggested results will appear as you type, click a suggested result or type a ticker like "AAPL" and press Enter on your keyboard or click the **"ADD"** button.
- → To build out a list using a specific equity or fund category, hit the **"LISTS"** button to filter based on different criteria including style, sectors, and investment strategies. Apply the filters and click **"SUBMIT"**.

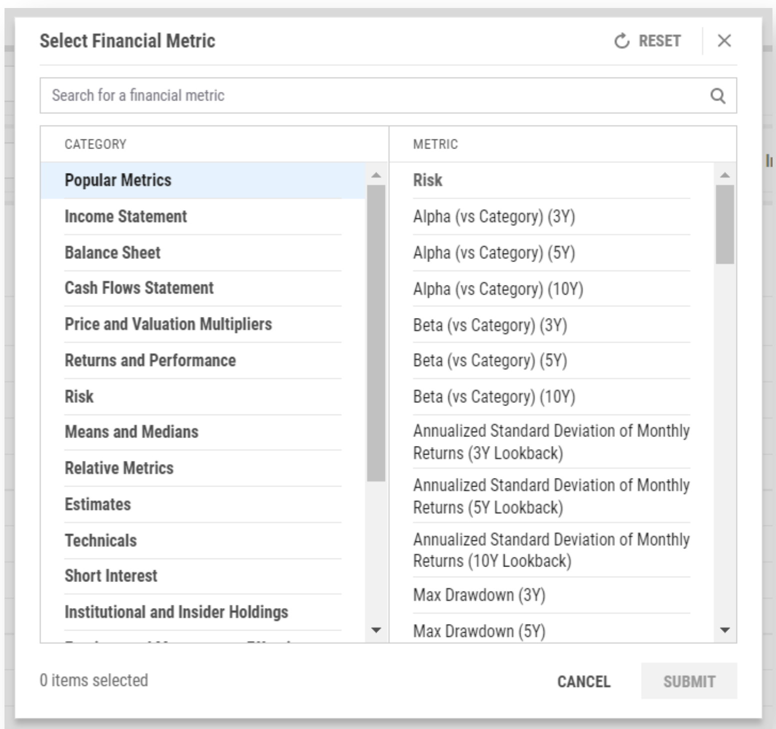


View in YCharts Comp Tables

Overview

3 Perform quantitative comparisons by entering a metric into the **Metrics** search bar and hit **"ADD"**. To explore the full range of options available, click on **"BROWSE"** and check off any metrics you want to include. Hit **"SUBMIT"** once complete.

4 Save metric sets by clicking on the **Metric Sets** drop-down and hit **"Save as metric set"**. Refer back to any saved metric sets by clicking **"Open metric set"**.



View in YCharts Comp Tables

5 For qualitative information, click on **"+Info Columns"** to search for and add any relevant info. Hit **"SUBMIT"** once complete.

6 Click on **"Summary Stats"** to add in additional information including "Maximum", "Average", Median", "Minimum", and "Sum".

7 Click **"New Comp Table (unsaved)"** to Save or Name your created chart, plus other options.

Pre-built Templates

1. Highlight **Tools** in the top banner then select **Comp Tables** in the dropdown menu.

2. From the defaulted Comp Table, click **"New Comp Table (unsaved)"** then select the first option, **"New from Template"**.

3. Choose from categories like **Performance**, **Fundamental**, and **Estimates** to see all available pre-built screens. The most popular templates include

Performance Stats:

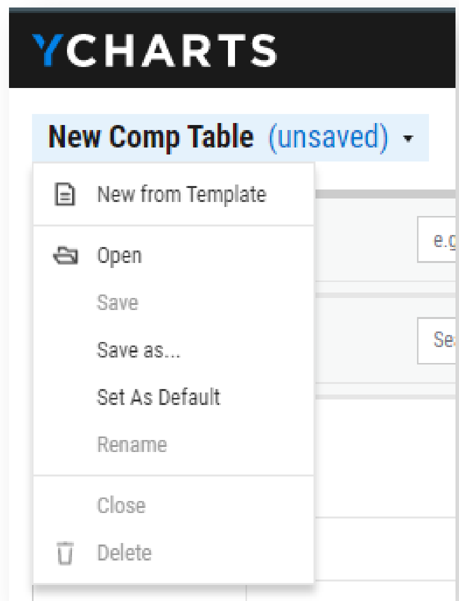
- IPO Performance
- S&P Momentum Stats
- US Sector Performance
- Dow Jones/Nasdaq/
  S&P 500 Performance Stats

Fundamental:

- MLP Analysis
- US Sector Fundamentals
- Dow Jones/Nasdaq/
- S&P 500 Fundamental Stats

Estimates:

- Earnings Radar
- Dow Jones/Nasdaq/
  S&P 500 Estimates Stats



View in YCharts Comp Tables

Create Scoring Models

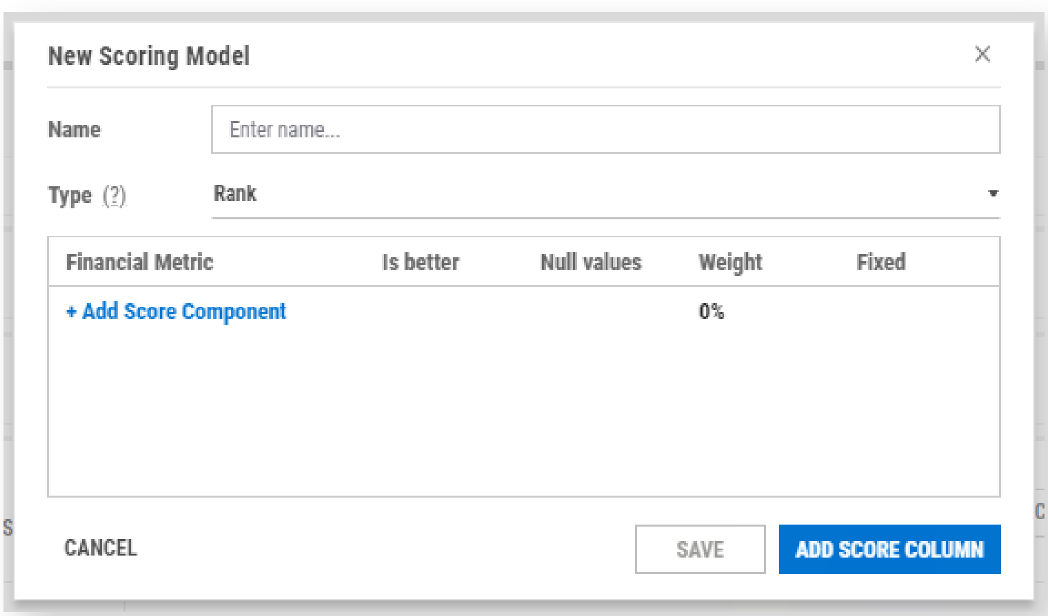
1 Build customized Scoring Models to objectively rank securities based on assigned weights and financial metrics. Click the **"Scoring Models"** dropdown, then **"+Create new scoring model"**.

2 Enter in the "Name" and "Type", then click **"+Add Score Component"**. Add the financial metrics you want to rank your securities for by searching for or selecting them using the category filters. Hit **"SUBMIT"** when complete.

3 Update for "Is better", treatment of "Null values", and percentage weight.
→ *Unchecking "Fixed" will automatically calculate and evenly distribute weights across all metrics that weren't explicitly dictated.*

4 Once all weights sum to 100%, click **"Add Score Column"** to apply. Hit **"Save"** to use at a later time.

5 To reference a previously saved model, click the **"Scoring Models"** dropdown then **"Open saved model"**.



Create a Scoring Model

Generate Reports

1 In the upper right corner, click "**Export**". Click **"Download PDF"** for the report.

2 Other options include **"Export to Excel Add-In"** or **"Export Data"** as a .CSV file.

ESG Fund Performance

Data as of Aug. 25, 2021

Symbol	Name	1 Month Total Returns (Daily)	3 Month Total Returns (Daily)	6 Month Total Returns (Daily)	1 Year Total Returns (Daily)	Annualized 3 Year Total Returns (Daily)	Annualized 5 Year Total Returns (Daily)	Annualized 10 Year Total Returns (Daily)	Annualized All Time Total Returns (Daily)
ACASX	Access Capital Community Investment A	-0.10%	0.28%	0.21%	-0.12%	3.22%	1.67%	1.88%	3.68%
ADJEX	Azzad Ethical	0.91%	12.92%	9.62%	32.21%	18.82%	17.70%	14.21%	7.89%
AFDAX	American Century Sustainable Equity A	1.70%	9.36%	16.56%	32.40%	18.96%	18.34%	16.39%	11.36%
AFDCX	American Century Sustainable Equity C	1.63%	9.15%	16.12%	31.42%	18.07%	17.46%	15.52%	10.52%
AFDGX	American Century Sustainable Equity R5	1.73%	9.47%	16.82%	33.01%	19.50%	18.80%	16.61%	11.49%
AFDIX	American Century Sustainable Equity Inv	1.69%	9.41%	16.69%	32.73%	19.24%	18.63%	16.68%	11.62%
AFDRX	American Century Sustainable Equity R	1.67%	9.27%	16.40%	32.07%	18.66%	18.04%	16.09%	11.07%
AFEIX	American Century Sustainable Equity I	1.73%	9.48%	16.80%	33.00%	19.49%	18.87%	16.90%	11.83%
AFYDX	American Century Sustainable Equity Y	1.73%	9.51%	16.89%	33.18%	19.67%	18.95%	16.68%	11.53%
AGEPX	American Beacon Frontier Mkts Inc Inv	2.12%	3.30%	6.49%	11.48%	7.04%	6.83%	--	5.57%
AGF137	AGF Global Sustainable Growth Equity	6.26%	17.23%	14.18%	32.03%	18.48%	14.75%	12.59%	7.46%
AGF6250	AGF Global Sustainable Growth Equity F	6.37%	17.60%	14.92%	33.69%	19.98%	16.20%	13.88%	6.95%
AGFCX	Alger Responsible Investing C	0.82%	12.46%	17.00%	28.83%	22.01%	21.04%	16.29%	5.67%
AGIFX	Alger Responsible Investing I	0.89%	12.66%	17.47%	29.79%	22.95%	22.00%	17.23%	6.49%
AGPIX	AGF Global Sustainable Growth Equity I	5.83%	12.92%	14.81%	41.84%	23.31%	--	--	19.85%
AGPRX	AGF Global Sustainable Growth Equity R6	5.83%	12.92%	14.81%	41.84%	23.31%	--	--	19.85%
AGTIX	AB Sustainable Global Thematic I	4.66%	11.05%	13.07%	37.30%	23.42%	20.40%	14.24%	12.48%
ALGZX	Alger Responsible Investing Z	0.92%	12.80%	17.72%	30.30%	23.46%	22.50%	17.46%	6.60%
ALTFX	AB Sustainable Global Thematic A	4.63%	10.98%	12.93%	36.94%	23.06%	19.98%	13.72%	12.24%
AMAGX	Amana Growth Investor	3.78%	14.63%	20.23%	39.46%	25.60%	23.23%	17.85%	12.52%
AMANX	Amana Income Investor	1.96%	5.76%	13.46%	25.97%	14.98%	13.17%	12.95%	9.30%
AMDWX	Amana Developing World Investor	-0.59%	0.98%	-3.45%	23.78%	11.97%	6.38%	2.98%	2.73%

Aug. 25, 2021 **FINRA members: For internal or institutional use only** Built with YCHARTS Page 1 of 25

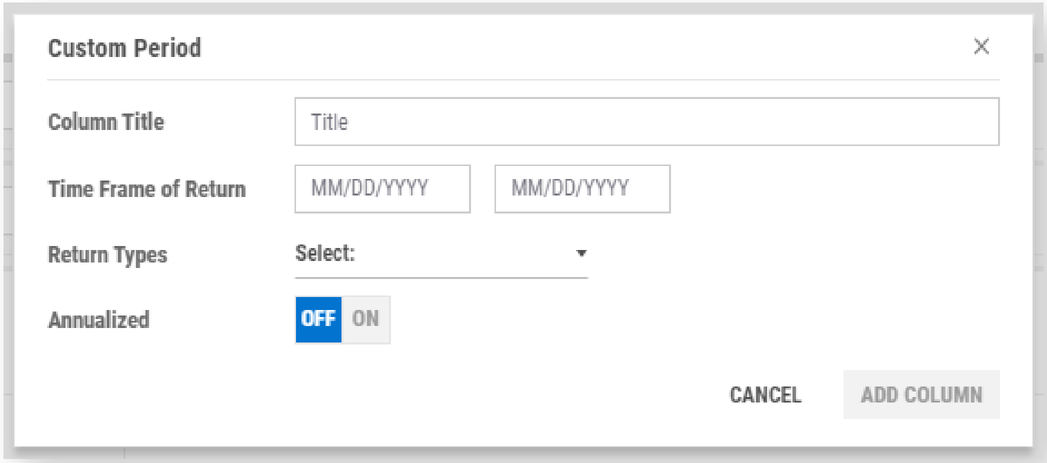
View in YCharts Comp Tables

Custom Return Periods

1 Click on **"Custom Periods"**.

2 Add a **Title** and **Date Range** (MM/DD/YYYY). Select between either "Price Return", "Total Return", "Std Deviation", "Max Drawdown", "Min", and "Max" from the **"Return Types"** dropdown. Lastly, toggle between **"Annualized"** data or not.

3 Once complete, hit the **"ADD COLUMN"** button.



Create Custom Return Periods

Pin Securities & Summary Stats

1 To pin securities to the top of a Comp Tables list, click the **pin icon** directly to the right of the security's ticker symbol. This will ensure securities of interest are always in view (and nearest any Summary Stats) even while scrolling through the full list of comparables.

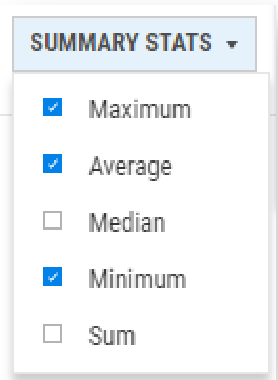
Results

30 Securities

Symbol	Name	PE Ratio	PS Ratio	Price to Book Value	Price to Free Cash Flow	Debt to Equity Ratio
AAPL	Apple Inc	24.69	6.245	47.14	22.10	2.370
PG	Procter & Gamble Co	24.95	4.445	7.690	30.85	0.7847
MCD	McDonald's Corp	31.52	8.417		35.56	-5.980
AMGN	Amgen Inc	20.36	5.068	35.95	15.19	10.64
AXP	American Express Co	17.59	2.464	5.145		1.76
BA	Boeing Co		1.871		54.41	-3.576
CAT	Caterpillar Inc	19.36	2.185	8.030	25.13	0.9341
CRM	Salesforce Inc	623.68	5.773	2.942	31.47	0.1786
CSCO	Cisco Systems Inc	17.80	3.925	5.030	15.51	0.2205
CVX	Chevron Corp	9.248	1.392	2.052	8.724	0.00
DIS	The Walt Disney Co	65.83	2.501	2.173	193.86	0.5091

Create Custom Return Periods

2 To add **"Summary Stats"**, click the drop-down of the same name located to the upper right of the results list. Select any of the options below to add those calculations to the top of the results list.



Share Data Tables

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2 Next, click **"Share with Team"** (if your and your colleagues' accounts aren't connected, this option will be grayed out) and a pop-up will appear.

3 Within the pop-up select the **"Anyone in:"** dropdown to designate which groups you would like to share your screen with.

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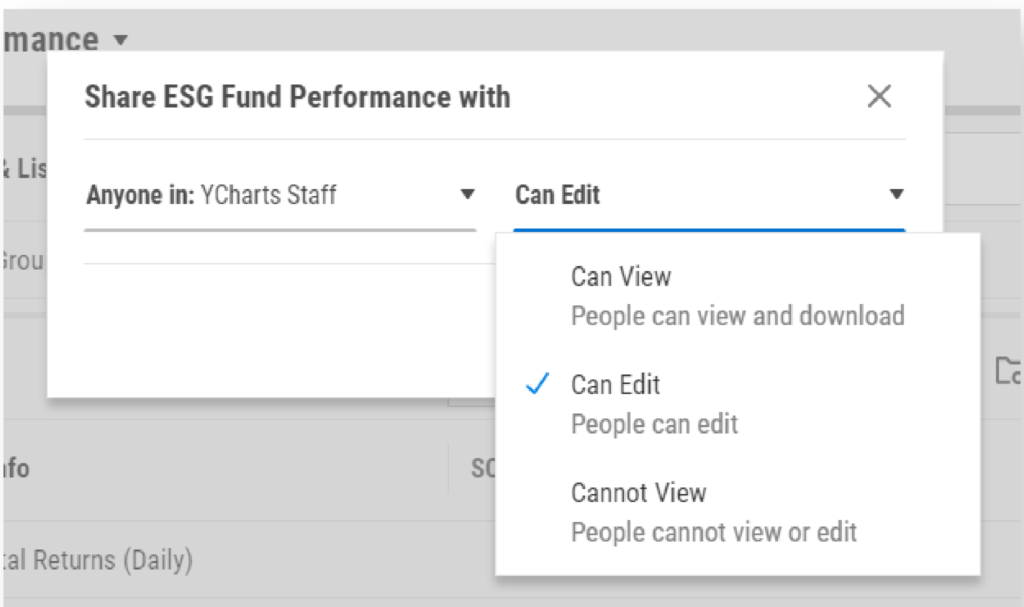


6 To retrieve previously shared data tables, click **"New Comp Table (unsaved)"** in the upper left. Then select the second option, **"Open"**. From there, navigate to the "Shared with Me" tab to view all previously shared data tables from your team.

Automate Your Analysis

When evaluating and comparing equities, mutual funds, ETFs or portfolios, use Quickflows to easily carry out your analysis between YCharts tools. Quickflows streamline your competitive research and keep you organized by condensing highly impactful workflows into single-click efforts. The analyses that Quickflows enable draw on industry best practices and feedback from experienced advisors using YCharts, helping you conduct high-quality research with less time and effort.

- Single Security & Comparison

See Quickflows in Action!

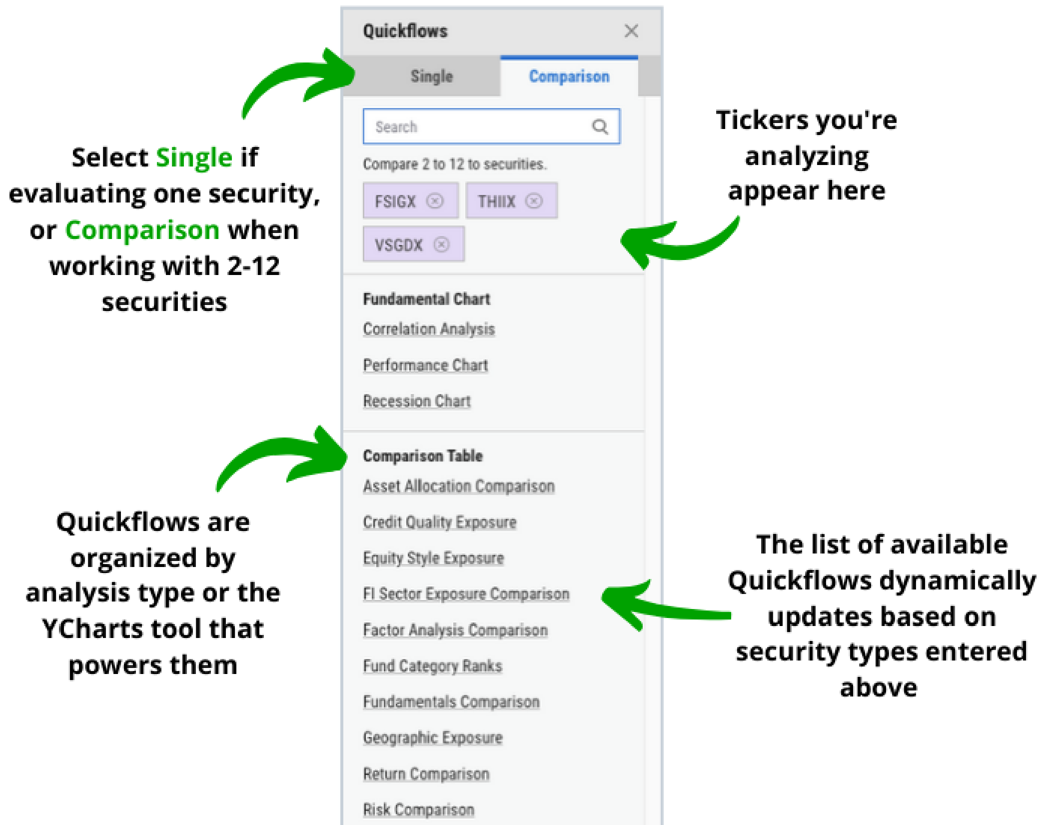
Single Security & Comparison Quickflows

1 Click the **"Quickflows Tab"** on the right edge of your browser when using tools like the **Screeners**, **Fundamental Charts**, **Comp Tables**, and others.

2 Click the **"Single tab"** to see pre-built research views for individual stocks, funds, or portfolios.

3 Click the **"Comparison tab"** to evaluate 2-12 securities in a head-to-head analysis of performance, valuation, and more.

4 To learn about more functionality, check out our **Quickflows blog post**.



Personalized Alerts, Where & When You Want

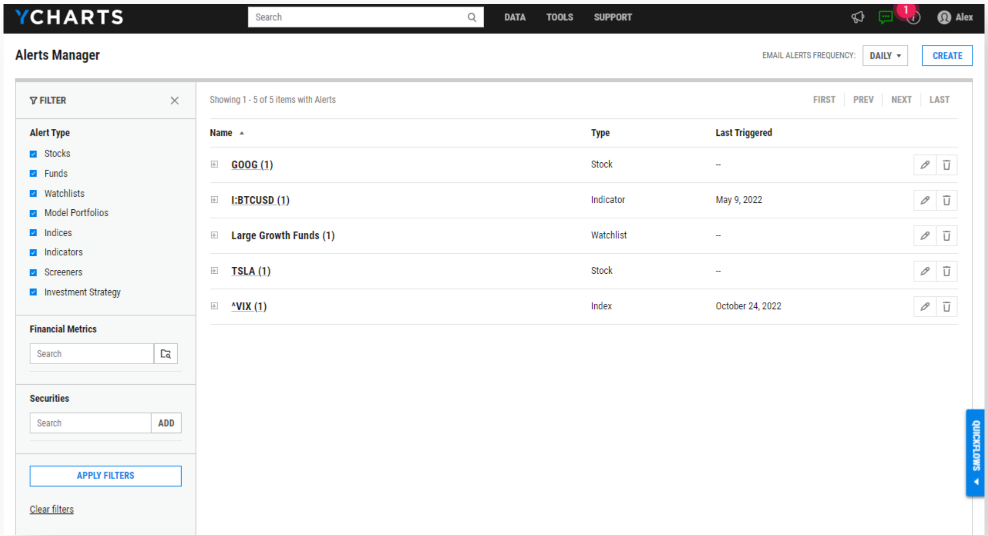
Create customized alerts for stocks, funds, economic indicators, and your Model Portfolios with the Alerts Manager. Set alerts based on performance swings, changes to financial metrics like valuation ratios, earnings and dividend events, and more. Plus, choose where and when you receive Alerts with options for emails or in-app notifications and real-time, daily, or weekly frequencies.

- Overview
- Set Watchlist Alerts
- Create Single Security Alerts

Watch the Alerts Manager in Action!

Overview

1 Manage all your alerts in the **Alerts Manager** by navigating to “Tools > Alerts”.



Visit the YCharts Dashboard

2 All previously created alerts will be listed on the page. To edit any of these alerts, click the **pencil** button.

3 To delete any previously created alerts, click the **trash** button.

4 To control the frequency in which email alerts are provided, navigate to the “Email Alerts Frequency” dropdown in the top right corner and select between **“As Soon as Possible”**, **“Daily”**, **“Weekly”**, or **“Never”**.

5 In the left-hand panel, you can also filter your list of previously created alerts by:

→ **Alert Type:** Utilize the checkboxes to only view the associated alert type (e.g. stocks, funds, watchlists, model portfolios, indices, screeners).

→ **Financial Metrics:** Search for financial metrics of interest and any alert that includes the associated metrics will show up as a result.

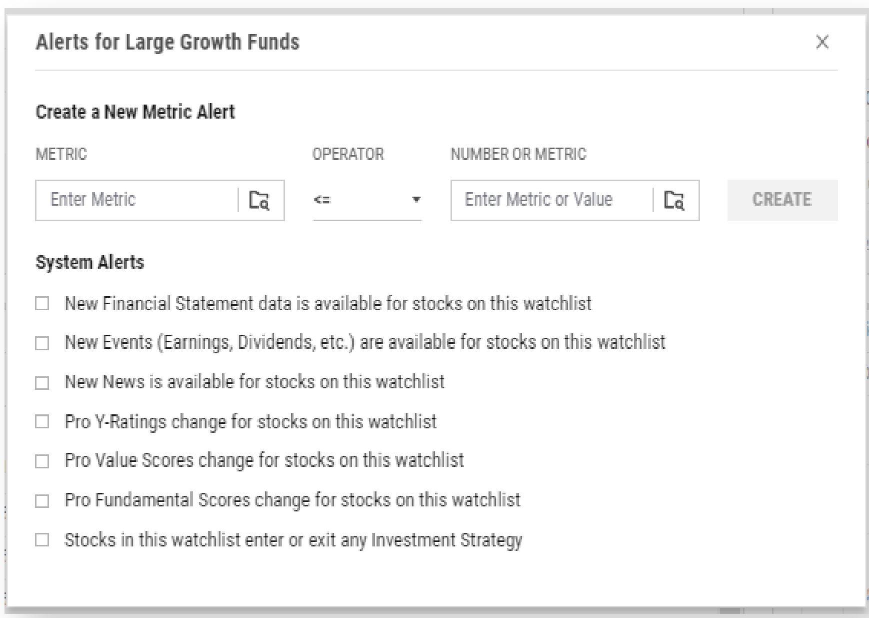
→ **Securities:** Search for a security’s name and any alert that includes the associated security (or securities) will show up as a result.

6 After applying the filters, click **“Apply Filters”** to see the alerts that match the defined criteria.

Set Watchlist Alerts

1 To set an alert for a Watchlist, navigate to the **Alerts Manager** by navigating to "Tools > Alerts Manager". Click **"Create"** in the upper right corner of the page to start.

2 Enter a watchlist's name into the "Create a New Alert" search bar.



Visit the YCharts Dashboard

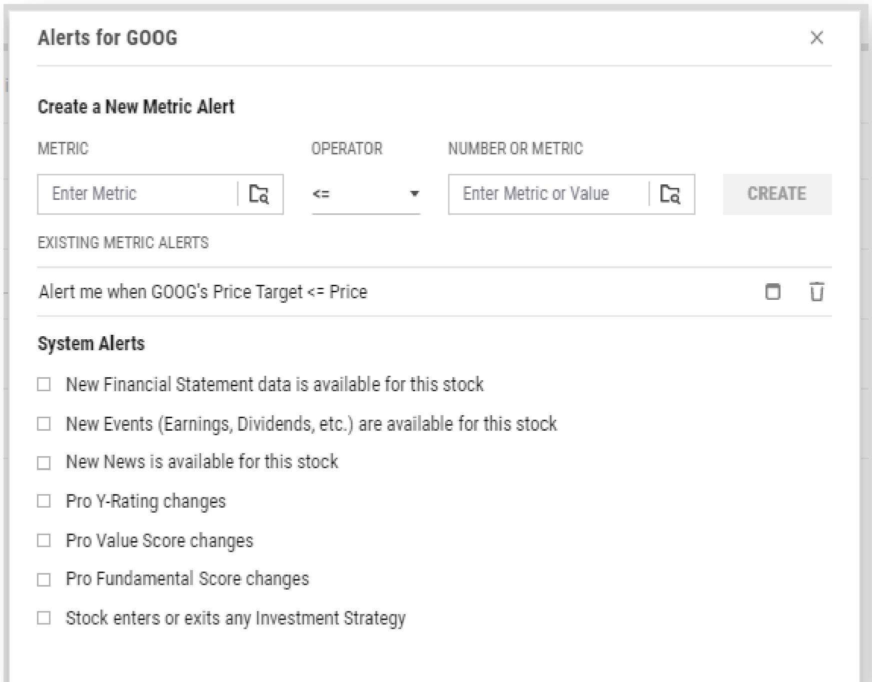
3 Within the "Create New Metric Alert" section, enter a financial metric of interest (e.g. YTD Fund Level Flows Category Rank) or search for available metrics by clicking the **folder icon**. Update for greater than (">=") or less than ("<=") using the drop-down and enter a value (or metric) you want to use as your alert's threshold amount.

4 Additionally, the "System Alerts" section provides you additional options to notify you of when other triggering events occur. Click **"Create"** once updates are complete.

Create Single Security Alerts

1 To set an alert for an individual security instead of a Watchlist, navigate to the **Alerts Manager** by navigating to “Tools > Alerts Manager”. Click **“Create”** in the upper right corner of the page to start.

2 Enter a security into the “Create a New Alert” search bar.



Visit the YCharts Dashboard

3 Within the “Create New Metric Alert” section, enter a financial metric of interest (e.g. Year to Date Total Returns (Daily)) or search for available metrics by clicking the **folder icon**. Update for greater than (“>=”) or less than (“<=”) using the drop-down and enter a value (or metric) you want to use as your alert’s threshold amount.

4 Additionally, the “System Alerts” section provides you additional options to notify you of when other triggering events occur. Click **“Create”** once updates are complete.

Explore YCharts' Securities Data Sets

YCharts offers one of the industry's most expansive and robust data platforms for researching and comparing securities. Available securities data sets include 20,000+ equities and ADRs traded on North American Exchanges (with intraday pricing and 30 years of historical fundamental data), plus 45,000+ mutual funds, ETFs, CEFs, and UITs (including asset flows, manager info, brokerage availability, category rankings, and more).

- Stocks
- Mutual Funds, ETFs, and CEFs

Watch the Stocks Page in Action!

Stocks Page

1 Hover on **Data** in the top banner then select **Stocks** in the dropdown menu.

2 The page is made up of several modules including:

Indices: Pre-populated with three of the US's largest stock market indices—the Dow®, S&P 500®, and Nasdaq. Adjust the chart's lookback period, ranging from 1-Day to Max, by clicking options in the chart's upper-left corner.

Performance by Index: Customize and re-order the indices shown here by clicking on "Edit Indices" in the module's upper-right. Next, toggle between your selected indices to view "Top Gainers (or Losers)", stocks that are "Pulling Up (or Down) the Index", events data, and related news articles.

→ **"Top Gainers"** and **"Top Losers"** sections show the eight best and worst stocks, on a percentage basis, for the selected index and lookback period.

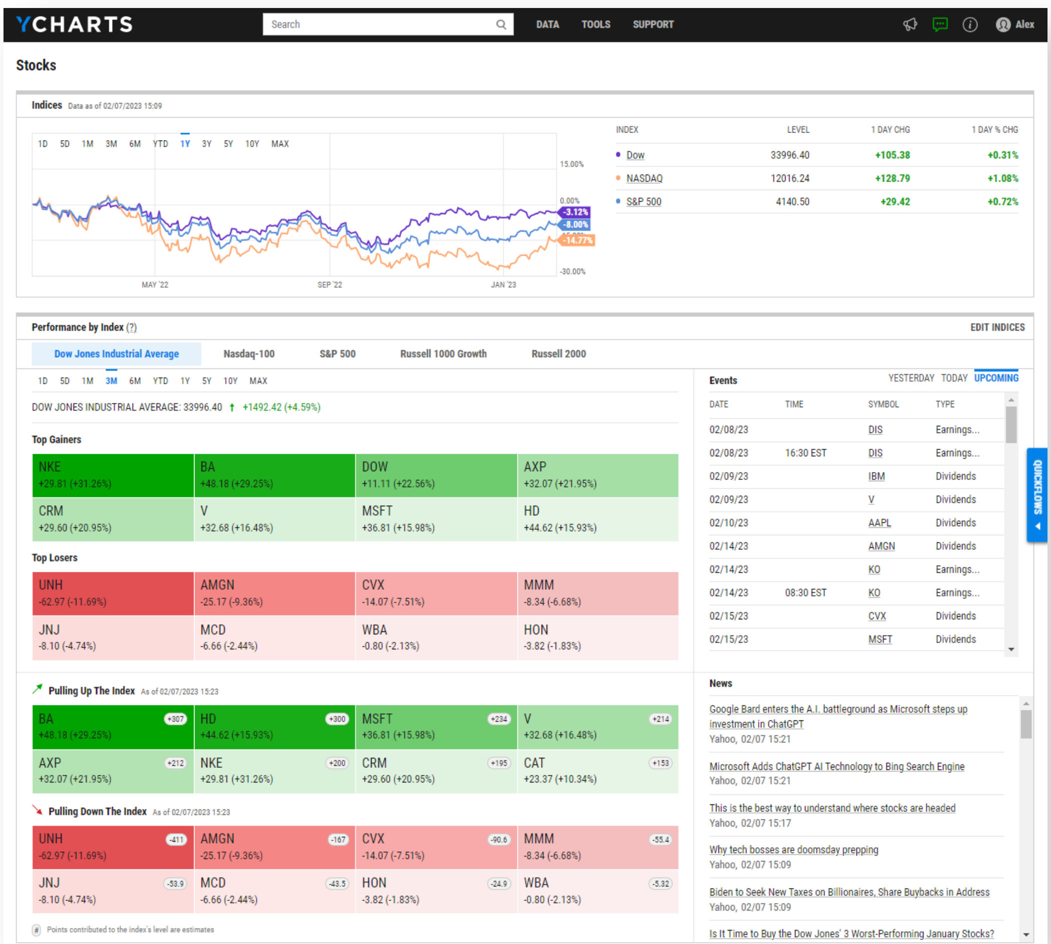
→ **"Pulling Up the Index"** and **"Pulling Down the Index"** show the eight stocks that are contributing or detracting most to/from the index's level change for the selected lookback period (points contributed to the index's total level are estimates).

→ **"Events"** provides the most recent or upcoming events, such as earnings announcements and dividends, for the constituents of the index that is being viewed.

→ **"News"** provides current news for the constituents of the index that is being viewed.

Stocks Page

Sectors: Provides a heatmap view of US or Canadian stock sectors. Toggle between the two countries and several lookback period options to adjust your view. The visual uses Standard & Poor's 11 sectors to show the 6 largest publicly traded companies within each sector based on market cap.



View Stocks Data in YCharts

Fund Pages

1. Hover on **Data** in the top banner then select either **Mutual Funds**, **ETFs**, or **CEFs** in the dropdown menu.

2. In the top left corner of the page, use the **"[Country Name]"** dropdown to select either the "United States" or "Canada". (This does not apply to the CEFs data page.)

3. Datasets are organized by:

   Performance by Style: Provides a holistic view of assets under management (AUM) and performance for each style category. The size of each box in the tree map represents the total AUM of all funds in a given style. Select between **"Equity Style"** or **"Fixed Income Style"** to focus on those categories.

   Performance by Broad Asset Class: Highlights the funds with both the highest and lowest Total Return NAV (Net Asset Value) on a percentage basis for the selected Broad Asset Class and lookback period. Click **"Edit Broad Asset Class"** in the top right corner of the module to customize.

   Fund Flows and Performance Over Time: Shows net asset flows and performance data across 1-Month, Year-to-Date, 1-Year, 3-Year, and 5-Year lookback periods for popular fund categories. Click **"See All Categories"** to view more data on a new page.

   Fund Flows and Performance: Provides a heatmap view of categories and respective funds by either Fund Flows or Performance over the selected time frame.

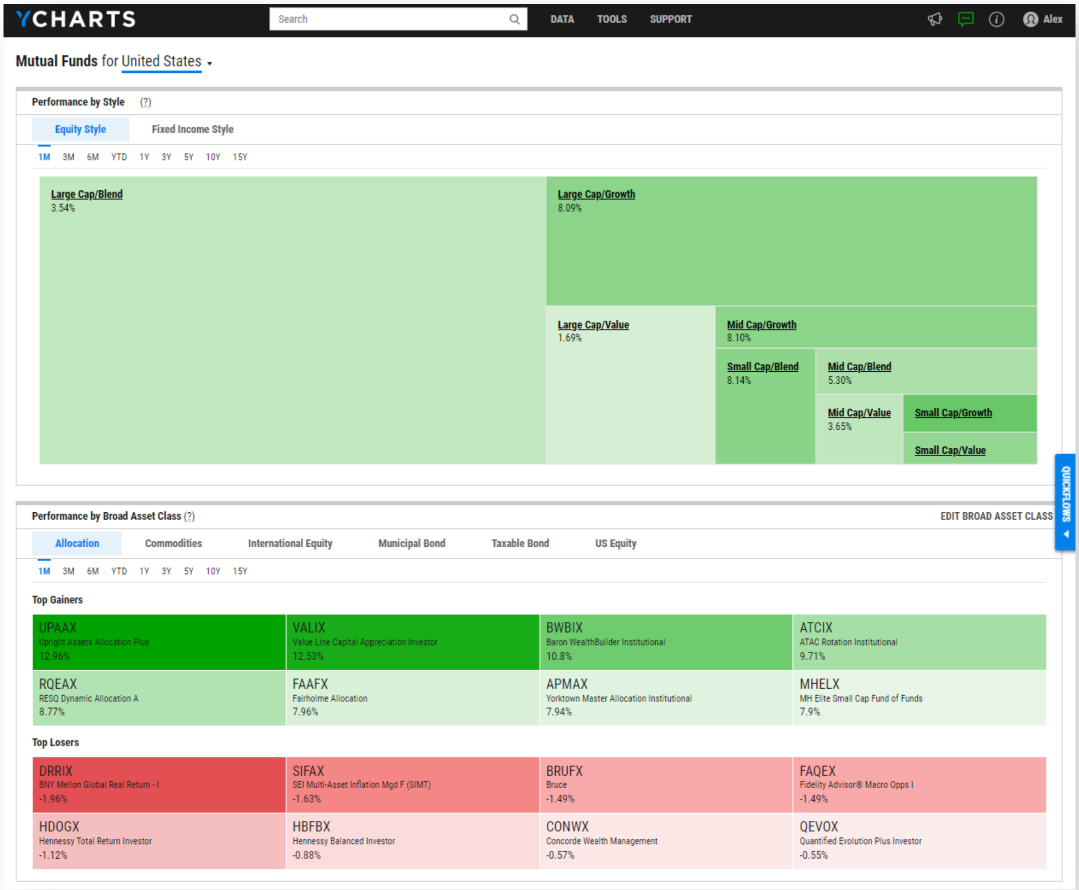
   → **Fund Flow Tab:** Categories are organized by net asset flows - the highest net positive flows (inflows) appear in the top left, and the highest net negative flows (outflows) at the bottom right. Within each category box are those funds with the highest inflows or the highest outflows, depending on the category's overall flows being positive or negative.

   → **Performance Tab:** Categories are organized by Total Return NAV - the highest-returning categories appear in the top left, and the lowest-returning at the bottom right. Within each category box are those funds with the best or worst returns, depending on the category's overall Total Return NAV being positive or negative.

Fund Pages

- **Editing Categories:** By default, the module shows 6 categories with the largest values and 6 categories with the smallest values for the selected time frame. Click **"Edit Categories"** to make changes.
- **View More Data:** Click any category name to open a Comp Table including fund flow and performance metrics for all funds within the respective category.

Fund Flow Report Library: Every month YCharts releases two sets of reports, focusing on US and Canadian markets, that compile the latest fund flows data, historical flows, and performance at both the category and individual fund levels. These reports give insight into where the market is trending and help inform your conversations with prospects and clients.



View Mutual Funds Data in YCharts

Tour YCharts' Economic Data Sets

The best investment strategies use assumptions based on high-quality economic data. To help your portfolios outperform, YCharts gives you access to more than 600,000 economic data series that add context to market movements and help you make predictions. All leading indicators and economic reports on YCharts are sourced from reputable institutions like the Federal Reserve, Bureau of Labor Statistics, and world-renowned universities, to name a few.

- Economic Indicators Homepage
- Economic Calendar
- Templates in Fundamental Charts
- Prebuilt Excel Add-In Reports
- Additional Resources

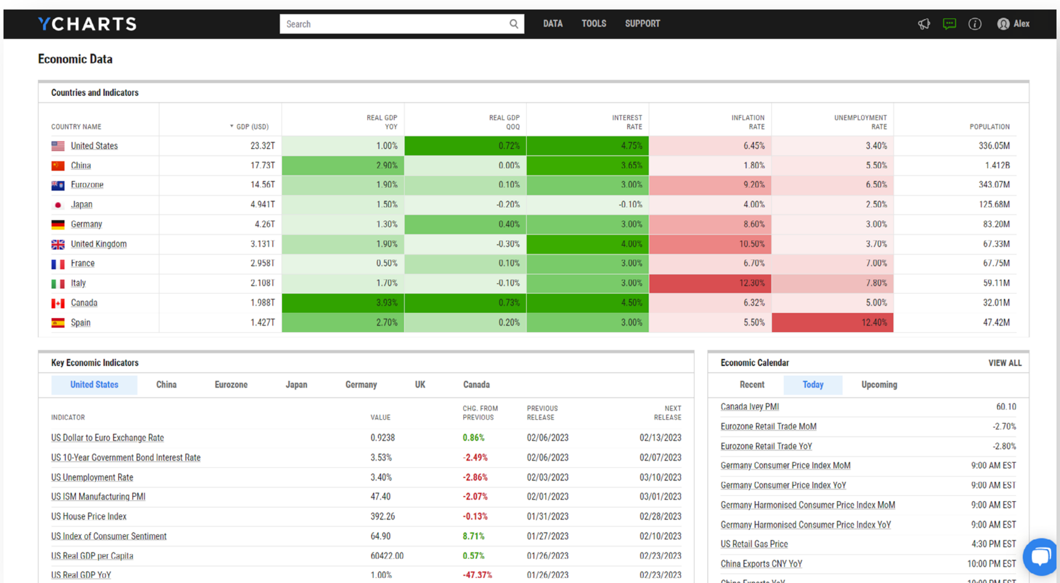
Economic Indicators Homepage

1 Highlight **Data** in the top banner then select **Economic Indicators** in the dropdown menu.

2 Datasets are organized by “Countries and Indicators”, “Key Economic Indicators”, “Categories”, “Geographies”, and “Reports.

3 On the right-hand side, an abridged **Economic Calendar** shows recent and upcoming economic prints, all linked to respective indicator pages. Click **“View All”** to expand.

4 Keep track of any **Economic Indicators** on the Dashboard. Refer to the **“Setup Your Dashboard”** section.

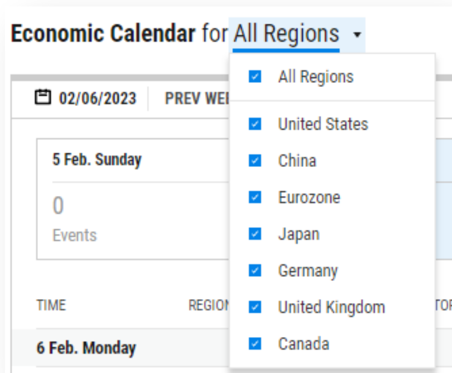


View Economic Data in YCharts

Economic Calendar

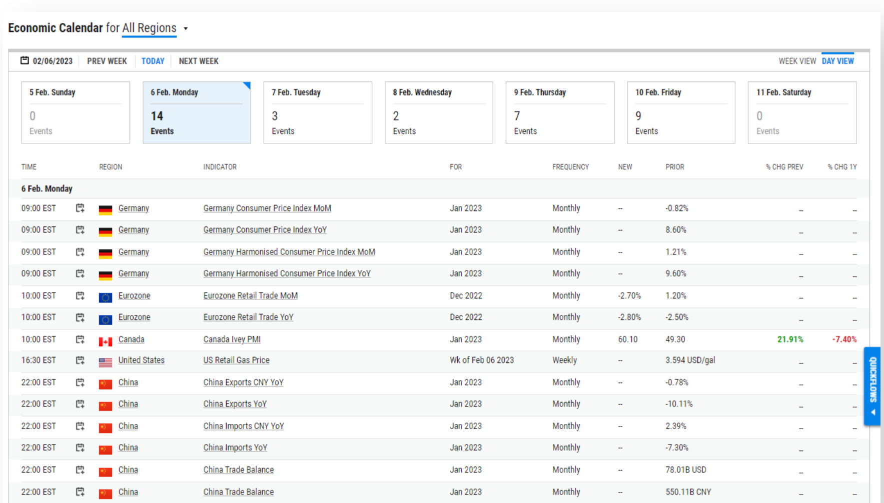
1 Hover on **Data** in the top banner, then select **Economic Calendar** from the dropdown menu.

2 Click the "All Regions" dropdown in the top right corner of the page to filter the calendar by various countries and regions. Customize your calendar view by checking the regions of interest.



3 To change the period view, click either **"Week View"** or **"Day View"** in the upper right corner of the page.

4 To view upcoming and previously released data, use the **"Prev Week"** and **"Next Week"** buttons to shift to a different period. Similarly, click the associated date when in "Day View" to view the events for a specific day.



View Economic Calendar in YCharts

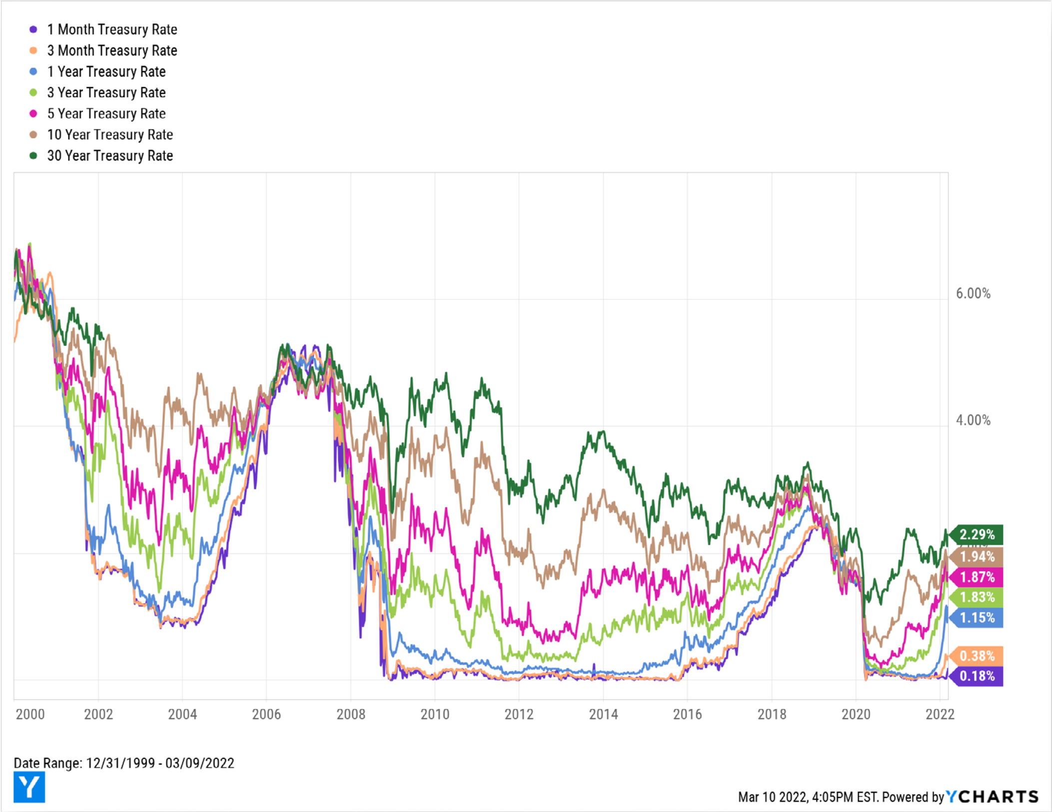
Templates in Fundamental Charts

1. Highlight **Tools** in the top banner then select **Fundamental Charts** in the dropdown menu.

2. Click **"New Fundamental Chart (unsaved)"** then select the first option, **"New from Template"**.

3. Choose from pre-built charts that visualize trends for **Economic Data**. Popular templates include: **"Major Oil Indicators"**, **"Mortgage Rates Chart"**, **"US Treasury Yield Curve Analysis"**, and "**Unemployment Breakdown"**.

   *Example: the US **Treasury Yield Curve Analysis** template automatically creates a visual representation of recent trends in US Treasury rates from 1 month to 30-year durations.*

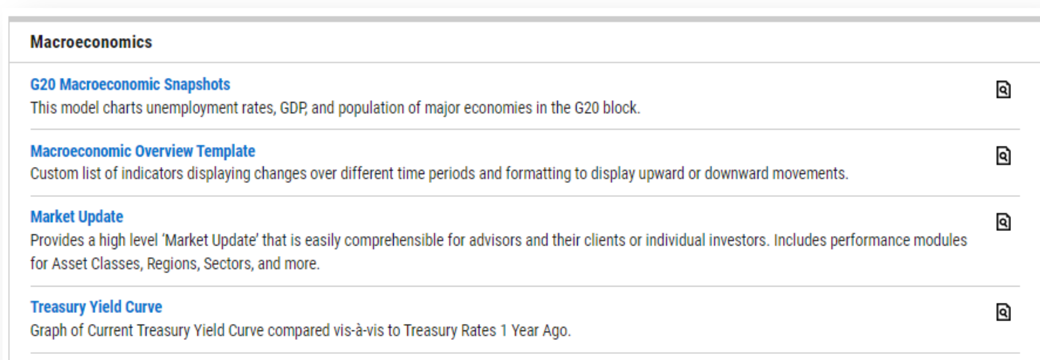


Prebuilt Excel Add-In Reports

1. Once you've **installed the Excel Add-in**, a number of pre-built Economic Data templates are available for you to use. From the **Excel** homepage, navigate to the **Templates** tab.

2. To download, simply click any of the various templates available. From here, modify and update your workbooks as desired.

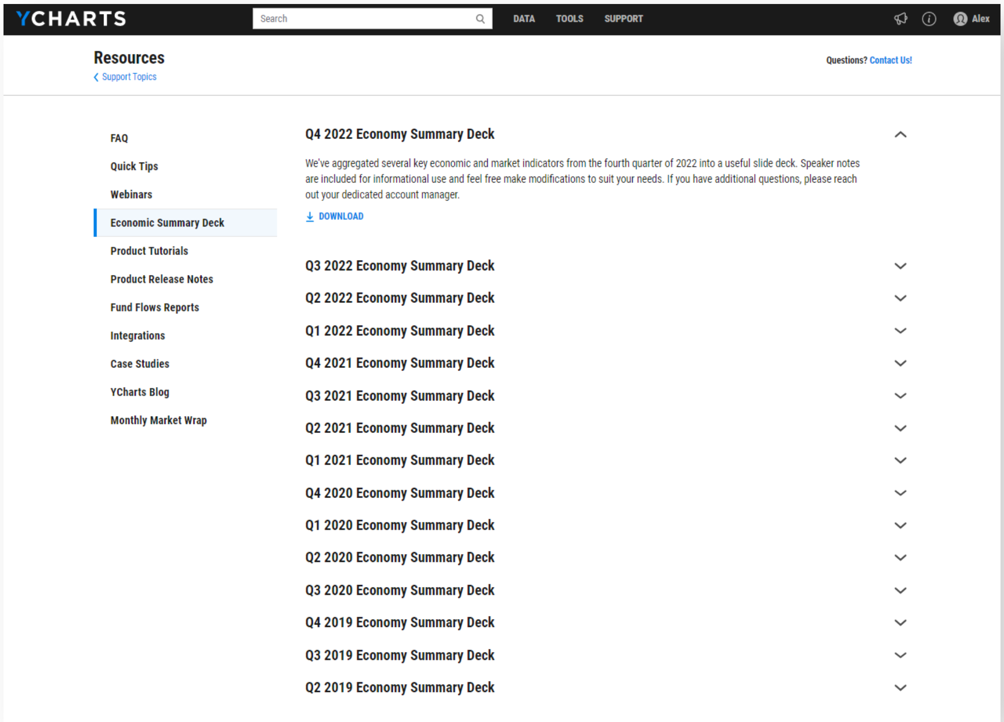
3. The templates for Economic Indicators can be found in the "**Macroeconomics**" section which includes: "Market Update", "G20 Macroeconomic Snapshots", "Macroeconomic Overview Template", and "Treasury Yield Curve".



View the Excel Add-In Templates

Additional Econ Resources

1 You can find additional Economic resources by hovering over **"Support"** and navigating to "**Support Topics > Resources"**. The **"Economic Summary Deck"** and **"Fund Flow Reports"** sections located on the left side of the page will provide you with the most recent, as well as all previous, versions of these resources.



View YCharts Resources

Power Your Models with the YCharts Excel Add-In

Manually updating Excel models can be tedious, time-consuming, and full of #ERRORs. The **YCharts Excel Add-In** dynamically links Excel with YCharts to pull in any datapoint you might find online to perform single security, multiple security, economic, and even Model Portfolio analysis with a single click. Additionally, YCharts' **custom formulas** are more intuitive than those from other tools.

You have access to over 40 pre-built templates encompassing portfolio comparisons, individual security analysis, financial statements, macroeconomics, and more fully customizable with your firm's branding to share with clients and prospects.

- Install Excel Add-In
- Pre-built Templates
- Export Data to Excel
- Syntax Guide & Reference of Metric Codes

Watch the Excel Add-in in Action!

Install Excel Add-In

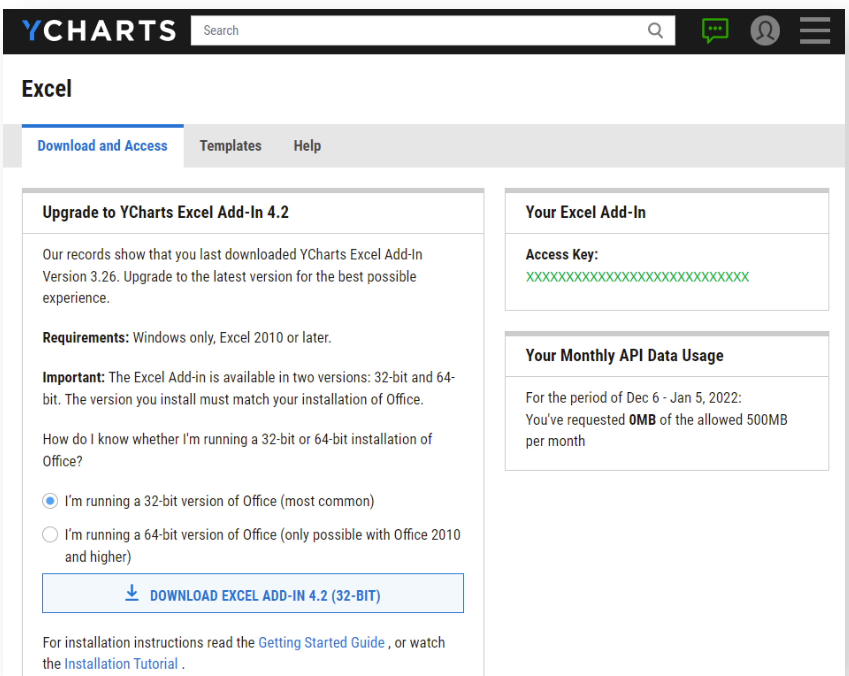
1. Highlight **Tools** in the top banner then select **Excel** in the dropdown menu.

2. Based on your version of Microsoft Excel, select between either the 32-bit or 64-bit version then click **"Download Excel Add-In"**. For guidance on figuring out which version to install, **watch this quick tutorial** to identify which version of Excel you have installed on your computer.

3. Once downloaded, run the installation and click through the various prompts, a combination of clicking **"Next**" and finally **"Finish"**.

4. Navigate back to the **Excel** homepage and copy your unique code under "Access Key" on the right side of your screen. You should be able to simply click on the code to copy it. A "Copied!" notification will also let you know you have successfully done so as well.

5. Restart Microsoft Excel then open a new workbook and navigate to the "YCharts" tab at the top. Paste the copied access code into the "Access Key" field on the right-most panel. Then click **"Login"**. YCharts' Excel formula syntax will now be accessible whenever you use Microsoft Excel.



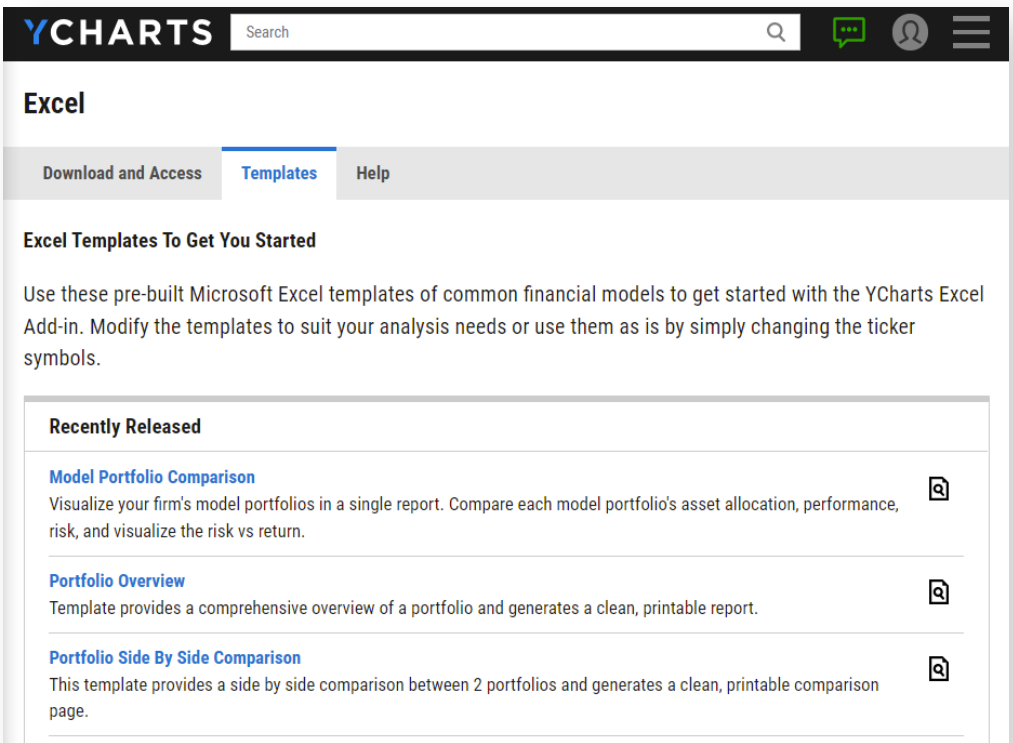
View the Excel Add-In Homepage

Pre-built Templates

1 Once you've installed the Excel Add-in, a number of prebuilt templates are available for you to use. From the **Excel** homepage, navigate to the **Templates** tab.

2 To download, simply click any of the various templates available. Modify and update your workbooks as needed from here.

3 Some of the most popular templates available include: "Market Update", "Model Portfolio Comparison", "Portfolio Overview", "Portfolio Side by Side Comparison", "Portfolio Withdrawal or Contribution Overview", and "Top Holding Analysis".

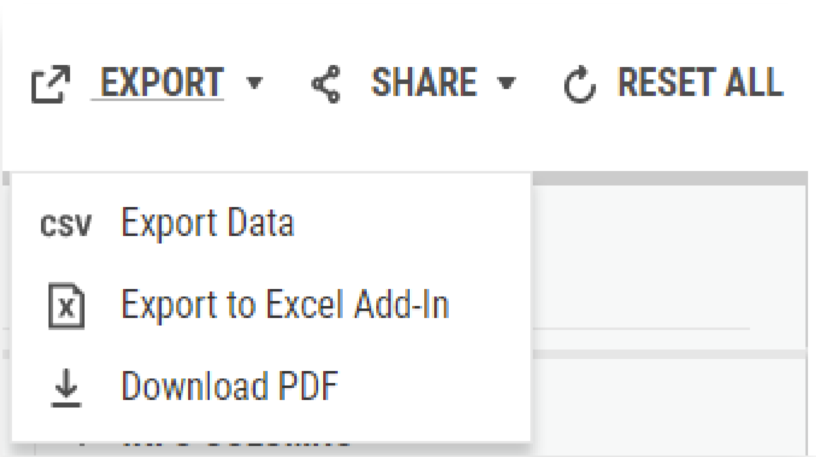


View the Excel Add-In Templates

Export Data to Excel

1 This feature is available within **Fundamental Charts**, the **Stock Screener**, the **Fund Screener**, **Comp Tables**, Timeseries Analysis, and from any security's "Data" tab. To start, navigate to one of these tools.

2 Once you've created a chart, data table, or screen (depending on the tool selected), click **"Export"** then **"Export Data"** (or **"Export to Excel Add-In"**, available in Comp Tables) in the upper right corner of the screen. A simple .csv file, or customizable .xlsx file will be created depending on your Export selection.

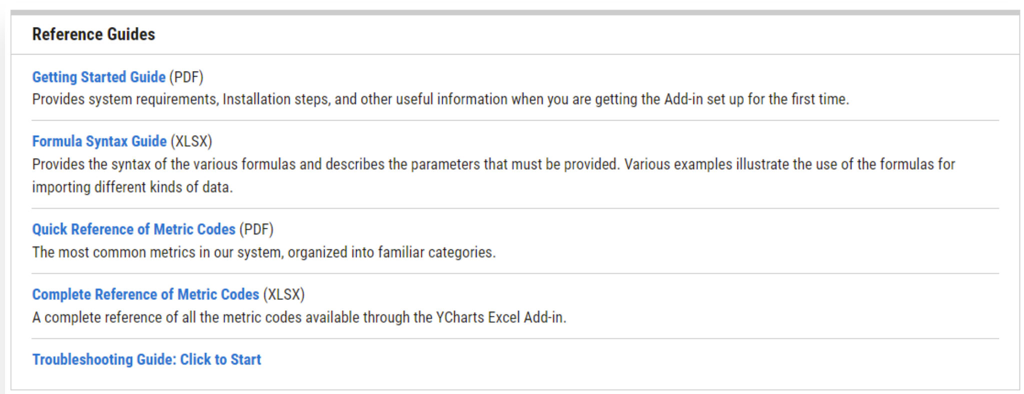


Syntax Guide & Reference of Metric Codes

1 The Excel Add-In reference and metric guides are available for you to have on hand when building out their custom workbooks without needing to memorize any formulas. From the **Excel** homepage, navigate to the **Help** tab.

2 Select from the options available and a file will be downloaded to your computer for easy reference.

3 You can find additional Excel Add-In **training videos** for a step-by-step tutorial for the most common formulas and features **here**.



Upload Your Own Data with Custom Securities

YCharts features extensive data for North American securities, but other investments like private equity, individual bonds, and delisted stocks are not covered on the platform.

Custom Securities enable you to upload return data and create proxies for non-public securities that may exist in your strategies, which can then be held in Model Portfolios, compared against other securities, or charted over time against economic indicators, such as inflation.

- Overview
- Filter for a Custom Portfolio
- More with Custom Securities

See Custom Securities in Action!

Overview

1. To create a new Custom Security, start by highlighting **Tools** in the top banner then select **Custom Securities** in the dropdown menu.

2. In the upper right corner, click "**+Create New**" and you will be redirected to the "Custom Security Editor" page.

3. Assign the security a name, description (optional), benchmark, and broad asset class classification (optional) in their respective fields.

4. Click **"Upload Data"** to open the dialog box.

Get Started.

Upload Data from a .XLSX or .CSV File

Examples of accepted date and value formats

DAILY RETURNS

Date	Value
1/1/2018	5.00%
1/2/2018	5.35%

DAILY LEVELS

Date	Value
1/1/2018	1234567890.1234
1/2/2018	1234567890.12

MONTHLY RETURNS

Date	Value
JAN-2018	0.0500
FEB-2018	0.1000

MONTHLY LEVELS

Date	Value
1/31/2018	1000.1234
2/28/2018	1000.12

ANY RETURNS

Date	Value
12/31/2018	7.35%
3/31/2019	12.34%

ANY LEVELS

Date	Value
1/7/2019	100542
1/14/2019	100924

Overview

5 **Drag + Drop** your file into the upload field, or click **"Browse for File from Computer"** to add a file from a folder on your computer. The system will confirm if your file is correctly formatted.

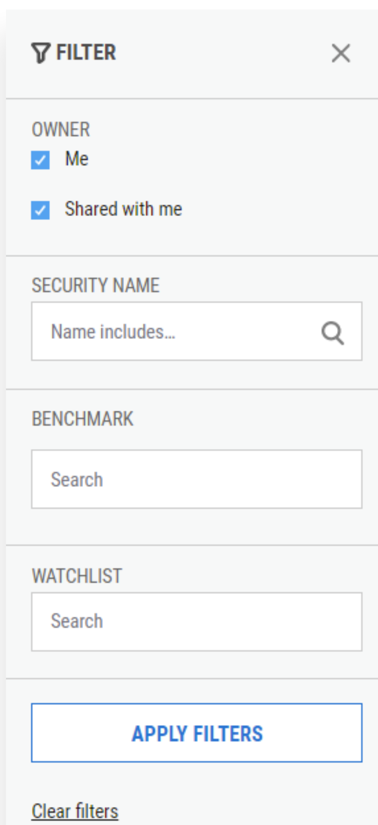
6 Click **"Submit"** to see a preview of the data you've uploaded to YCharts.

7 Click **"Save"** in the upper right-hand corner of the screen to finalize your built custom security.

8 Now that you've successfully created a custom security, you can utilize it like you would any other security available on YCharts and include it in a **Model Portfolio**, charting it within **Fundamental Charts**, or visiting its very own quote page, which you can navigate to by clicking on the newly minted security on the **Custom Securities** homepage.

Filter for a Custom Security

1. From the **Custom Securities** page, use the **Filter** side panel on the left to locate specific data sets you've uploaded.
2. Filter for **Owner** by checking or unchecking "Me" or "Shared with me".
3. Search using the **Security Name** field and type search terms for previously created Custom Security names.
4. Utilize the **Benchmark** criteria to filter by the index against which your Custom Security's risk metrics are calculated (e.g. S&P 500, Russell 2000).
5. Filter using the **Watchlist** criteria to filter by inclusion in any of your saved Watchlists.



View in Custom Securities

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

More with Custom Securities

1 Navigate to a security's quote page by clicking on its name from the **Custom Securities** homepage or by searching its name in the black navigation bar.

2 From any Custom Security Quote Page, click the **"Allocations"**, "**Fundamental Chart",** and **"Data"** tabs to understand its asset allocation and exposures, visualize the security's performance against its benchmark, and review other statistics.

3 Another feature is Notes, where you can add a narrative specific to the corresponding security. Click on the **"Notepad"** icon directly to the left of the "+Watchlist" button to add any notes or dialogue in the "New Note" field. Click **"Save"** to finish.

4 Click on the **"+Watchlist"** button to add the security to a new or previously created watchlist.

→ **For a previously created Watchlist:** Hit the **"+"** button directly to the right of the designated Watchlist you'd like it to be added to in the "Other Watchlists" section. Then close the dialogue box to finish.

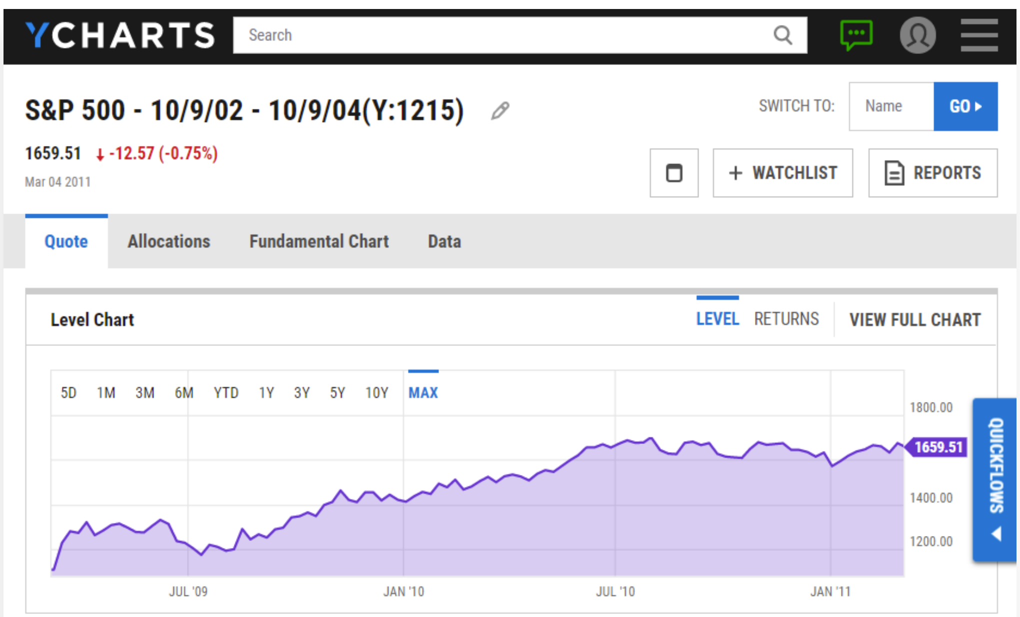
→ **For a new Watchlist**: Enter the name in the field at the top of the pop-up, then click **"Create"** once complete.

More with Custom Securities

1 Click on the **"Reports"** button in the upper right corner to generate a report. Select between "Comparison" or "Overview" reports.

→ **Comparison Reports:** Select the report of interest within the "Comparison" tab and click **"Start"**. Add securities of interest. Once complete hit **"Next"**. Customize your report by updating the fields for "Report title", "Prepared for", "Organization", "Contact phone", "Contact URL", and "Contact Email". Once complete hit **"Generate"** and a PDF file will be created for you.

→ **Overview Reports:** Select the report of interest within the "Overview" tab and click **"Start"**. Customize your report by updating the fields for "Report title", "Prepared for", "Organization", "Contact phone", "Contact URL", and "Contact Email". Once complete hit **"Generate"** and a PDF file will be created for you.



View in Custom Securities

Stay Up-to-Date with Email Reports

Create a custom update with visuals and data, sent right to your inbox at a frequency of your choosing. Email Reports keep you and your team up-to-date on earnings calls, dividends & announcements for your top holdings, model portfolio performance and allocation swings, plus the latest economic data as reported by the Fed, Bureau of Labor Statistics, and others.

- Overview
- Pre-built Templates
- Update Email Report Frequency
- Add Saved Charts
- Add Saved Screens Events

Watch Email Reports in Action!

Overview

1 Hover over **Tools** and click **“Email Reports”** in the dropdown menu.

2 For any existing Email Report in your account, click the **“Edit”** pencil icon or the **“More Options”** dropdown menu to **“Preview”**, **“Duplicate”**, or **“Delete”** it.

3 To create a new Email Report, click **“+ Create New”** in the upper right corner of the page.

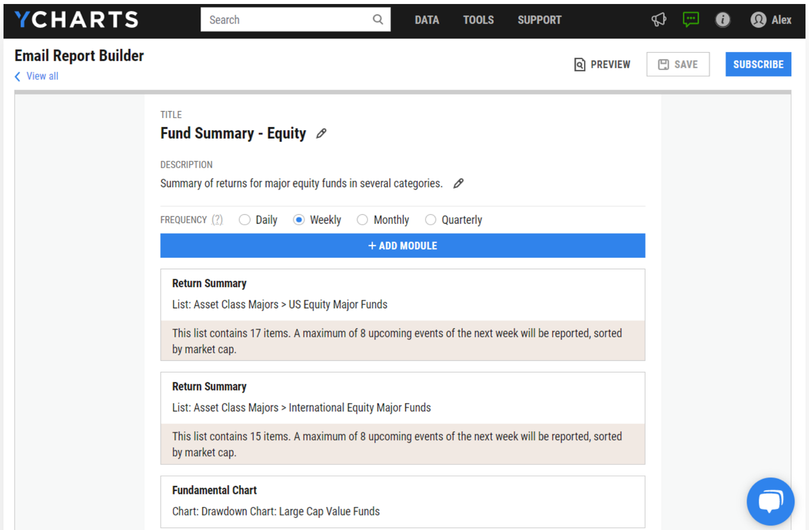
4 Use the **“Title”** (which determines the email’s subject line each time it’s sent), **“Description”**, and **“Frequency”** options to set your preferences.

5 Click **“+Add Module”** to add a new section to the Email Report and choose from the module type options. Click **“Next”** and follow the subsequent prompts for each module to pull data from a Watchlist, Model Portfolio, or Chart of your choice.

6 Hover over any added module to see the **“Reorder”**, **“Preview Module”** (if available), and **“Delete”** options.

7 Click **“Save”** at the top of the screen once all your modules and preferences have been set.

8 Click **“Subscribe”** at the top of the page for this Email Report to be sent to the email address associated with your YCharts account..

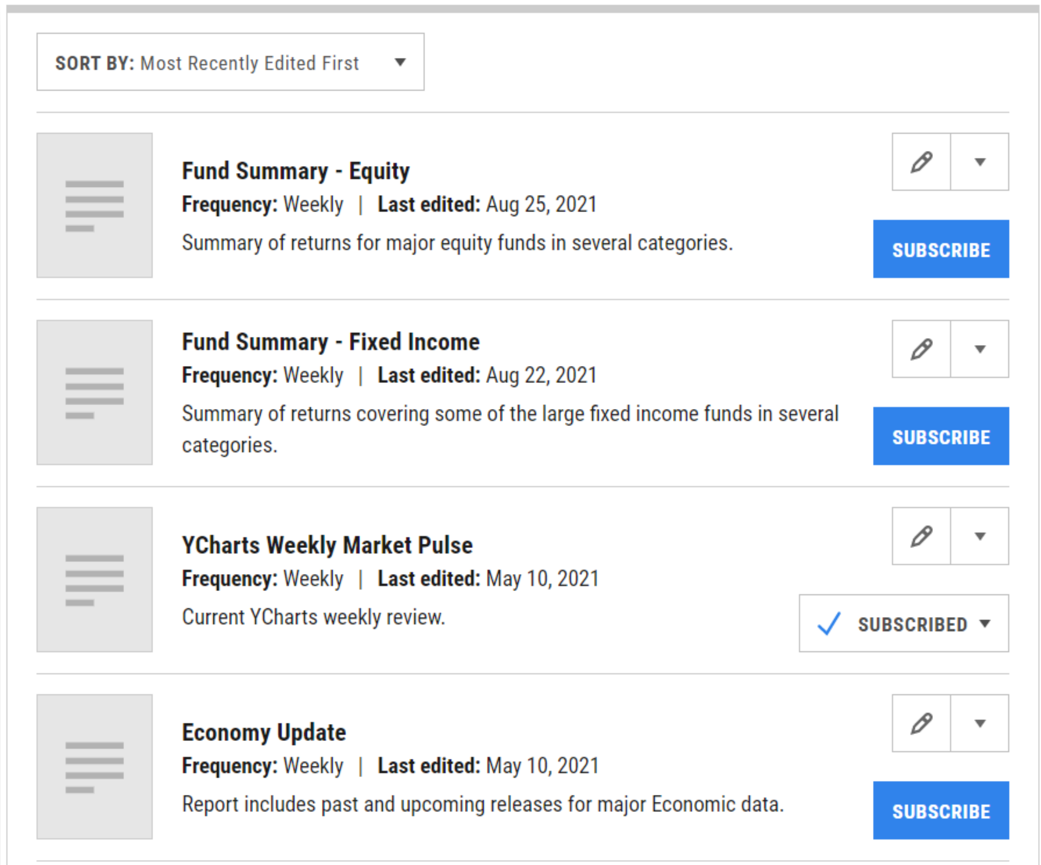


Visit YCharts Email Reports

Pre-built Templates

1 A number of default email reports are available to use as is or to edit. These templates include: “Economy Update”, “Daily Stock Update”, “Fund Summary” (Equity or Fixed Income), “YCharts Weekly Market Pulse”, and more. To edit any of these pre-built templates, click the **pencil icon** next to its name.

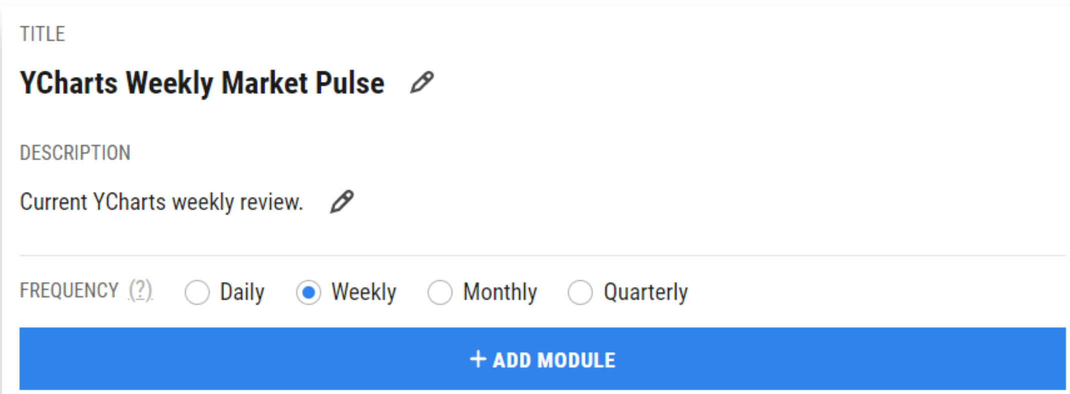
2 Alternatively, subscribe to an existing email report by clicking **“Subscribe”**.



Visit YCharts Email Reports

Update Email Report Frequency

1. To edit the frequency in which an email report is sent to your inbox, click the **"Edit" pencil icon** of the corresponding email report.
2. Click the frequency in which you'd like to receive the report. Choose from **"Daily"**, **"Weekly"**, **"Monthly"**, or **"Quarterly"**.
3. Hit **"Save"** once complete.



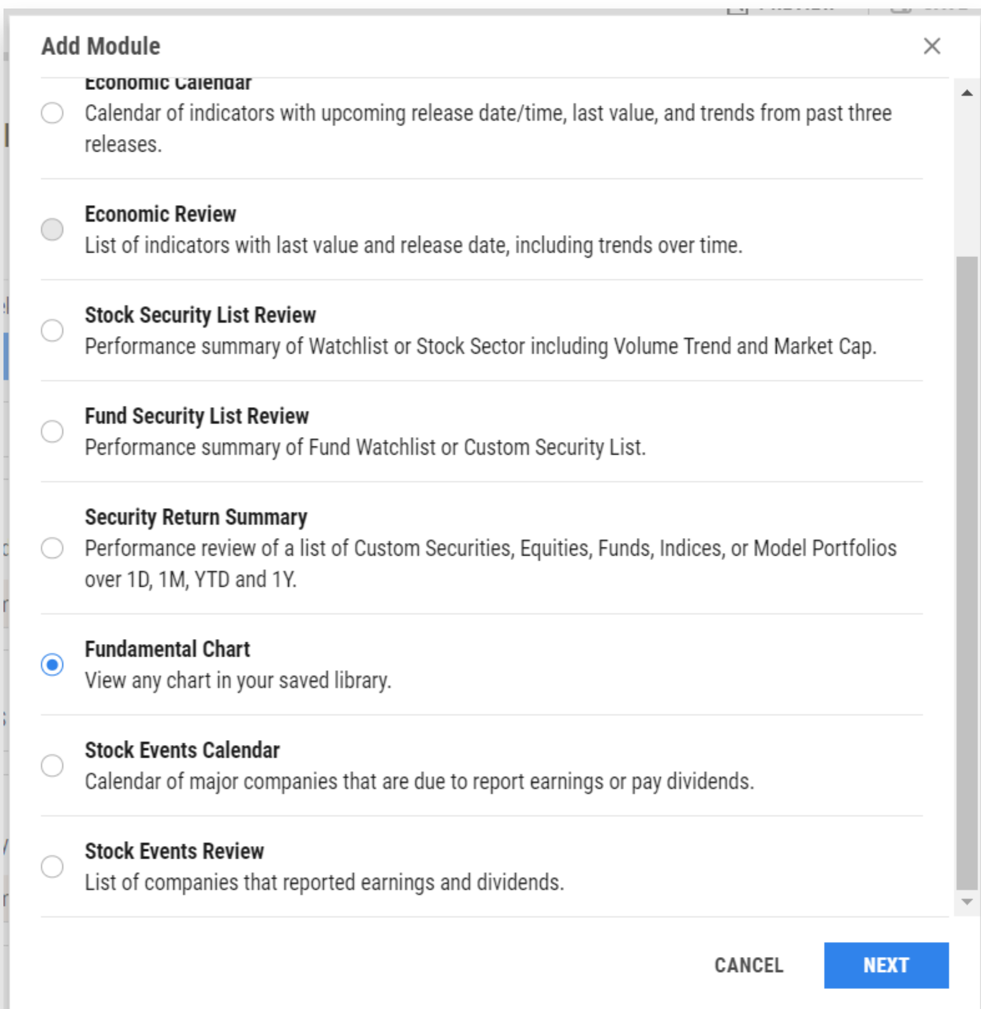
Visit YCharts Email Reports

Add Saved Charts

1 To add a chart to any Email Report, navigate to the Email Report Builder screen.

2 Click, **“+ Add Module”** and then select **“Fundamental Chart”**.

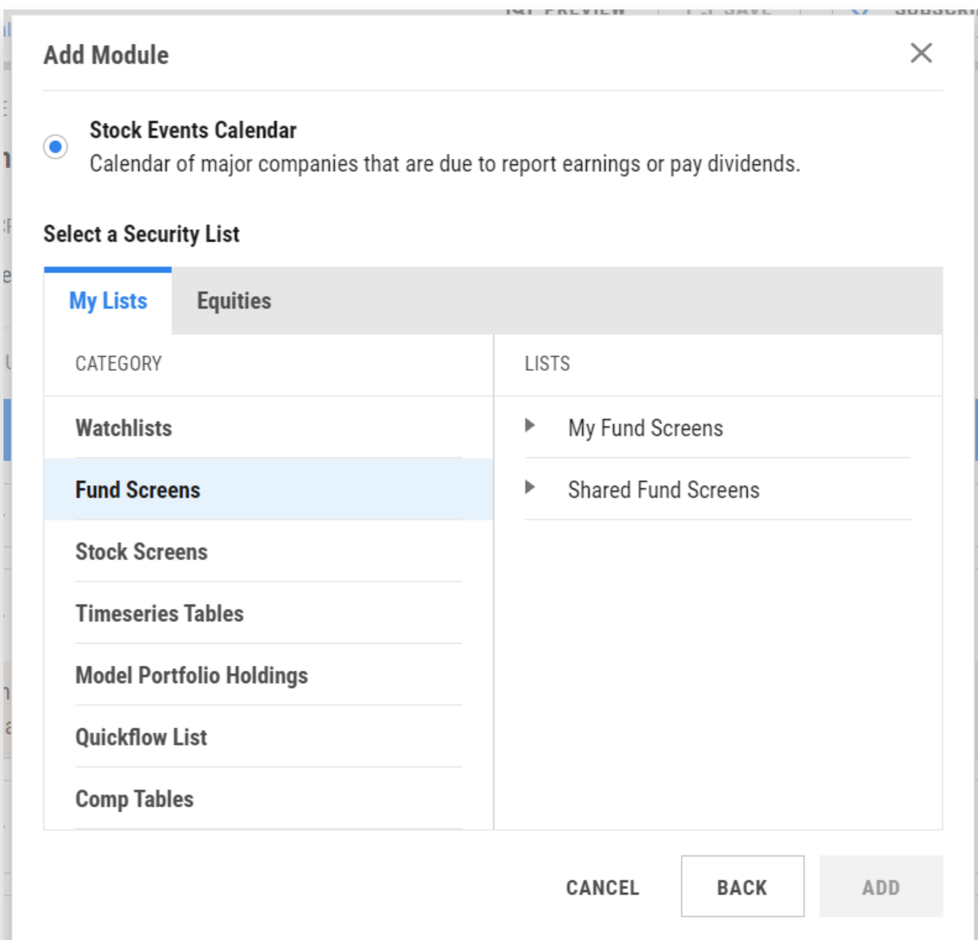
3 Select from the list of saved charts in your account and click **“Add”**.



Visit YCharts Email Reports

Add Saved Screen Events

1. To include notifications for Screener results lists in your Email Report, navigate to the Email Report Builder screen.
2. Click, **“+ Add Module”** and then select **“Stock Events Calendar”**.
3. Navigate to the **“My Lists”** tab. Select **“Stock Screens”** or **“Fund Screens”** to reference results lists from either tool.



Visit YCharts Email Reports

Resources

Quick Tips

To get the most from YCharts and additional tips and tricks on how to use the various YCharts tools, check out **YCharts' Quick Tips** for each of our tools:

- **Dashboard**
- **Mutual Fund & ETF Screener**
- **Comp Tables**
- **Fundamental Charts**
- **Quickflows**
- **Model Portfolio**

Economic Summary Deck

Each quarter, YCharts aggregates several key economic and market indicators from the most recent period into a useful slide deck. Speaker notes are included for informational use and feel free make modifications to suit your needs. You can find all **previous slide decks here**.

Subscribe to receive YCharts' Quarterly Economic Summary Deck send directly to you.

Monthly Market Wraps

On a monthly basis, YCharts publishes a downloadable, customizable slide deck that breaks down the most important market trends for advisors, asset managers, and their clients. The Monthly Market Wrap covers everything from major index returns, sector movement, hot stocks of the month, laggards & losers, and economic data. **Subscribe to the Wrap** to receive the deck every month.

Fund Flows Reports

Every month, YCharts releases two reports that compile the most recent fund flow numbers, historical flows, and performance data at both the category and individual fund level. They give a view of where the market is trending in just a few pages, and can help inform your conversations with prospects and clients. You can find all previous reports at **YCharts' Fund Flows Library**.

Subscribe to receive YCharts' Monthly Fund Flows Report sent directly to your inbox!

Resources

Blog
As a way to supplement the research and analysis tools available, YCharts writes timely and relevant blog posts. From articles highlighting the current state of the market to step-by-step how-to articles walking you through a new YCharts feature, blogs are maintained with the intent of providing further education to our readers. Check out the **blog here**.

Webinars
Stay up to date on all upcoming YCharts webinars ranging from product webinars highlighting the best YCharts advisor workflows to partnered webinars hosted by influencers and large wealth management firms covering the latest market trends. **Subscribe** to receive periodic webinar notifications or visiting the **webinar homepage** to register for one now.

Other Resources
For additional resources that YCharts offers, check out our **Other Resources** page on the YCharts platform.

Account Settings & Customizations

Account Information

To review your account information and make changes, hover over your name and user profile icon in the upper right corner of any YCharts page. Click **"Manage Account".** Next, navigate to any of the noted sections below.

- Account Basics
- Membership
- Billing Information
- User Preferences
- Report History
- Report Branding
- Share Groups

User Preferences

Control the types of email notifications you receive, News Sources utilized throughout your YCharts account, Quickflows preferences, or other communication preferences.

Report History

View and access a running feed of all reports generated from your account. Use the Date Range and Filter options to review specific time periods and/or report types.

Report Branding

Customize your account, reports, and any marketing collateral generated through YCharts to reflect firm logos, colors, and other branding needs.

For firm logos and icons, follow the "Data Format Requirements" to ensure proper dimensions and file types that can be used. For firm colors, you'll need to identify each color's specific RGB Color Code and enter the associated values (up to 12 custom colors).

Share Groups

Share Groups can be used to collaborate and share assets with your colleagues. You can share Model Portfolios, Charts & other assets with any of your Share Groups, and set the permission level to either "View Only" or "Edit".

To create or edit Share Groups, please **contact Customer Support** or start a chat.

Within this section, you can view your permissions for each group you belong. You will only be able to see the members of a Share Group if you've been given sharing permissions.

Dashboard
Fundamental Charts
Scatter Plot
Scenarios
Report Builder
Model Portfolios
Stock & Fund Screeners
Comp Tables
Quickflows
Alerts Manager
Securities Data Pages
Economic Data
Excel Add-In
Custom Securities
Email Reports

Contact Us

Support Team

Each YCharts client is partnered with their own account manager to assist with account set-up, initial onboarding, and any further product training that's wanted or needed. Our knowledgeable team takes the time to understand your business goals, and is always there to help you get the most from YCharts.

You can find your support representative's contact information by navigating to "**Support - Support Topics - Contact Us**". Schedule time with your customer success manager for a one-on-one meeting or general questions to learn how you can use YCharts for your specific use case or reach out to them directly via email or by phone.

Live Chat

At the bottom right corner of most pages within YCharts, you will find a blue chat bubble that will allow them to speak directly with a support representative directly. This chat feature is available during regular business hours between 8AM to 5PM C.T.

For additional support and general inquiries, check out our **Support Topics** page or reach out directly via email at **support@ycharts.com** or by phone **(866) 965-7552**.