

YCharts Quick Start Guide

for Northwestern Mutual Advisors



YCharts for Northwestern Mutual

Why YCharts?

YCharts is the go-to proposal and investment research platform tailored for all NM practices. Whether you're utilizing **NM's Signature Portfolio**, **Signature Choice** (or both), YCharts enables you to streamline and automate your processes to achieve more AUM growth in less time.

Want to Learn More? Start a free trial or schedule a personalized overview today.

"If you're serious about gathering assets to build out your practice, you need a tool like YCharts to educate your clients, demonstrate your value, and improve reporting on model performance"

> - Chris Collins, Owner/Founder at Collins Financial

See how Chris Collins and his team use YCharts!

Northwestern Mutual-Exclusive Features

Home Office-Approved Reports

- Educate your clients and show prospects how you can add value using a suite of NM-exclusive reports approved for prospect proposals and client communications
- Control the depth that comparison and overview reports go into to tailor the content to clients and prospects alike
- Streamline your research and meeting prep with NM-exclusive templates
- Available for Signature Portfolio & Signature
 Choice model portfolios

Fully Integrated Research & Analysis

- Leverage up-to-date Signature Portfolios and Signature Research, Off-Research & ESG Lists
- Generate smarter investment ideas and document due diligence with YCharts' full suite of screening, visualization, and comparison tools
- Utilize proprietary NM Blended Benchmarks to compare against client portfolios and hypothetical strategies





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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!

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

Email Reports

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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

Custom Securities

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

Email Reports

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 popup 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.

Equity vs. Fixe	d Income							÷	ł
Overview	Data	Events Alerts					141	Change Security List	
SYMBOL .		1 MONTH TOTAL RETURNS (DAILY)	3 MONTH TOTAL RETURNS (DAILY)	YEAR TO DATE TOTAL RETURNS (DAILY)	1 YEAR TOTAL RETURNS (DAILY)	5 YEAR TOTAL	ø	Edit Watchlist Duplicate Watchlist	
AGG		4.06%	6.88%	4.06%	-7.62%		Ø	Edit Data Columns	
DIA		2.97%	4.97%	2.97%	-1.79%			View in	
QQQ		13.01%	9.65%	13.01%	-17.07%			- .	
SHY		0.95%	1.87%	0.95%	-2.28%		CSV	Export	•
SPY		7.42%	7.33%	7.42%	-7.83%		<u></u>	Snare watchilst	
TLT		8.93%	12.61%	8.93%	-21.79%		Ø	Rename Module	
						Shor	×	Remove from Dashboard	
Updated 11:35 AM									

Visit the YCharts Dashboard

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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".

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.



Scatter Plot

Share Modules

- 1. From the **Dashboard**, identify the module you want to share and click the 1 "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".

Sectors		
Overview	Data Events Alerts	1D 5D 1M 3M 6M YTD 1Y 3Y 5Y 10Y MAX
SYMBOL .	NAME	Share Sectors with ×
XLB	Materials Select Sector SPDR® ETF	420.00
XLC	Communication Services Sel Sect SPDR®ETF	Anyone in: YCharts Staff Can Edit (13.63
XLE	Energy Select Sector SPDR® ETF	Custom Text Can View Additional A
XLF	Financial Select Sector SPDR® ETF	
XLI	Industrial Select Sector SPDR® ETF	Enter custom text 390.00 People can edit
XLK	Technology Select Sector SPDR® ETF	Cannot View
XLP	Consumer Staples Select Sector SPDR® ETF	People cannot view or edit Jan 2 Jan 9 Jan 16 Jan 20 Jan 30
XLRE	Real Estate Select Sector SPDR®	41.61 0.72 1.76% 02/02 15:07
XLU	Utilities Select Sector SPDR® ETF	69.43 0.22 0.32% 02/02 15:07 • SPDR® S&P 500 ETF Trust Price (USD) 413.63
XLV	Health Care Select Sector SPDR® ETF	132.69 -1.30 -0.97% 02/02 15:07
XLY	Consumer Discret Sel Sect SPDR® ETF	154.87 3.34 2.21% 02/02 15:07 Updated 2:05 PM
Overview	Data Events Holdings Alerts	TIME (ET) NAME ALERT
Overview	Data Events Holdings Alerts	01/06.00/07 Bast Darforming Crowth ETEs Evite: 1/010 IIICO Viewall
SYMBOL F	TOTAL TOTAL MAX RETURNS RETURNS DIVIDEND ALPHA BETA DRAWDOWN	10/24 08:02 *VIX *VIX *VIX Level >= vour target level of 30:00. Its current value is 30:12.
*	(DAILY) (DAILY) YIELD (3Y) (3Y) (3Y)	10/21 15:42 *VIX *VIX *VIX *VIX Level >= your target level of 30.00. Its current value is 30.07.
P:824600	8.10% -10.14% 1.26% 0.6522 1.044 34.28%	10/20 12:32 VVIX <u>VVIX Level</u> >= your target level of 30.00. Its current value is 30.02.
P:824601	28.62% -27.80% 1.26% 24.58 1.926 54.61%	10/07 09:10 *VIX <u>*VIX Level</u> >= your target level of 30.00. Its current value is 30.59.
P:824602	8.09% -9.17% 1.26% 0.9746 1.041 34.80%	10/06 15:02 *VIX *VIX *VIX Level >= your target level of 30.00. Its current value is 30.41.
P:824603	28.62% -27.80% 1.26% 24.58 1.926 54.61%	10/05 10:22 *VIX *VIX *VIX Level >= your target level of 30.00. Its current value is 30.02.
P:824604	8.11% -10.57% 1.32% -1600.30 480.69 26.83%	10/03 11:21 VIX *VIX Level >= your target level of 30.00. Its current value is 30.14.
P:824605	28.62% -27.80% 1.26% 24.58 1.926 54.61%	09/30 11:57 VIX <u>VIX Level</u> >= your target level of 30.00. Its current value is 30.23.
	Showing 25 ▼ 1 - 6 < >	09/26 08:01 VIX <u>VIX Level</u> >= your target level of 30.00. Its current value is 32.28.
		09/23 12:31 VIX <u>VIX Level</u> >= your target level of 30.00. Its current value is 30.14.
Updated 2:05 P	PM	06/30 08:03 VIX <u>VIX Level</u> >= your target level of 30.00. Its current value is 30.08.
		NIL COLO STATE AND A CO

Visit the YCharts Dashboard

Scatter Plot

Scenarios

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!

Excel Add-In

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

- Highlight Tools in the top banner then select Fundamental Charts in the dropdown 1 menu.
- Click "New Fundamental Chart (unsaved)" then select the first option, "New from 2 Template".
- Choose from pre-built charts that visualize trends in Economic Data, Major Asset 3 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



Custom Securities

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Alerts Manager

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Excel Add-In

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.

Line Style WEIGHT Default ▼	COLOR - EXAMPLE	
View Events	View Min / Max / Avg	Line Customizations
 Earnings Results (E) 	Min. Line	Force Original Data (?)
 Dividends (D) 	Max. Line	Force on Single Panel (?)
□ Splits (S)	 Average Line 	 Area Chart
Spinoffs (S)		
		RESET APPLY

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 \rightarrow text box will appear with pre-populated text, which you can update via the popup 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.
 - \rightarrow 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

Custom Securities

Email Reports

YCHARTS | FUNDAMENTAL CHARTS

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.
- Add a security and financial metric in the "Security A" and "Security B" areas. A financial metric is not required for economic indicators.

Ratio		Spread	Correlation	
Security A : FIXED	•	SPDR® S&P 500 ETF Trust (SPY)		×
Metric		Total Return Level		×
Security B : FIXED	•	10-2 Year Treasury Yield Spread (I:102YTYS)		×
Metric		N/A: Metrics are not available for economic data.		
			CANCEL SUBMIT	

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.

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Securities Data Pages

Economic Data

Excel Add-In

Custom Securities

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-intime 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!

Scatter Plot

Excel Add-In

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.

Scatter Plot

Overview

- Within each of the X-Axis and Y-Axis sections, type in the search bar to identify the 5 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).
- Click "New Scatter Plot (unsaved)" to Save and Name your created chart, plus 7 other options.

Securities & Lists <u>(?)</u>		~
Search	ADD	:≡ LIST
Scatter Plot Type <u>(?)</u>		
Point in Time		
Timeseries		
X-Axis (<u>?)</u>		
Search		۲ą
MM/DD/YYYY		
Y-Axis (<u>?)</u>		
Search		۲ą
MM/DD/YYYY		

Excel Add-In

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

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

- Equity Style Flows vs Performance
- Sector Flows vs Performance
- Asset Class Analysis
- Factor Breakdown
 - Major Index Comparison

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"**.

SHAPE COLOR SIZE EXAMPLE Cross ▼ Medium + + + + Show X/Y Data ☑ Show Ticker Show Name Show Dates ☑ Show Currency Code RESET	SPDR® S&P 500 E	FF Trust (SPY)	×
Cross Medium H++++ Show X/Y Data Show Ticker Show Name Show Dates Show Currency Code RESET APPLY	SHAPE	COLOR	SIZE	EXAMPLE
 Show X/Y Data Show Ticker Show Name Show Dates Show Currency Code RESET APPLY 	Cross •	•	Medium 🔻	+++
Show Dates Show Currency Code RESET APPLY	□ Show X/Y Data	🗹 Sho	w Ticker	Show Name
RESET APPLY	Show Dates		□ Show 0	Currency Code
			RESET	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

- The efficient frontier is a set of optimal portfolios that offer the highest expected 1 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.
- For example, use this set of passive allocation funds and add any previously 2 created model portfolios to the chart.
- Customize the added model portfolios (e.g. shape, color) to more readily distinguish 3 between your portfolios and the efficient frontier funds.



Scatter Plot

Email Reports

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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".

Anyone in: YCharts Staff	▼ Can View	Ŧ
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	People ca	an view and download
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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.

Dashboard

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!

Scatter Plot

Excel Add-In

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.
- Click "+Add a Scenario" to create a specific contribution or withdrawal schedule. 3 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).

Scatter Plot

Scenarios

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

- 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.

SPDR® S&P 500 ETF Trust	Ø
COMPARE TO	
Benchmark (?)	
Other Security (?)	
Saved Scenario (?)	
START DATE <u>(?)</u>	
12/31/2019	Ø
END DATE <u>(?)</u>	
06/30/2021	Ø
INITIAL INVESTMENT (?)	
\$10.000	Ø

- 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"**.



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

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

View in Scenarios

Excel Add-In

Email Reports

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".

	Fill in	Portfolio	Details	S&P 500 Total Return	0	🖹 SAVE
	ADVISORY FEE		BENCHMARK (?)	S&P 500 Total Return	0	
	ADVISORY FEE					
	Never •	(2)	ANNUALIZED FEE	REBALI	ance frequency (?) erly ▼	
or series (?) common • MM/DD/YYYY Type to or ticke	LEVEL (?). Custom Value Search	e • 10000 h for nam	es nts	AS OF (?) Initial ▼ MM/DD/Y	۲үү OAD DATA Č RESET UP	DATE
	1	Target Weight			1	
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	Q	0	×	to uplo	oad holdings	
0 (?)		0				
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Build a Model Portfolio

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.

Upload Da	ta from a .XLSX or	.CSV File
Examples of accept	ted 'Date', 'Symbol' a	and 'Target Weight'
Date	Symbol	Target Weight
Date 01/01/2018	Symbol AAPL	Target Weight 0.5
Date 01/01/2018 01/01/2018	Symbol AAPL MSFT	Target Weight 0.5 0.5
Date 01/01/2018 01/01/2019	Symbol AAPL MSFT NFLX	Target Weight 0.5 0.5 0.25

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.

Symbol	Name		TARGET WEIGHT	▼ <u>(?)</u>	
P:1784	Balanced ETF Model	Q	25	% ×	
P:468887	Large Cap Growth Portfolio	Q	25	% ×	
P:500373	Core Model Portfolio, Basic ETF - 65% Equity	Q	25	% ×	
P:643192	Proposed Model - Growth	Q	25	% ×	
	Search	Q	0	% ×	
	Search	Q	0	% ×	
	+ Add Items	1	100%		

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.



40

Custom Securities

Economic Data

Excel Add-In

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.

▽ FILTER	×
OWNER	
Shared with me	
SECURITY NAME	
Name includes	Q
BENCHMARK	
Search	
WATCHLIST	
Search	
APPLY FILTERS	
<u>Clear filters</u>	
Build a Model Po	rtfolio

Excel Add-In

Email Reports

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"**

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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".

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**

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.

YCHARTS	Search		Q	;	$\odot \equiv$
Integrations					
Partner Name	Integration	Status			
X Orion	Portfolio Holdings	S Inactive		М	ANAGE 🔻
Black Diamond	Portfolio Holdings	S Inactive		М	IANAGE 🔻
Redtail	Portfolio Holdings, SSO	S Inactive		м	IANAGE 🔻
	Activate Pa	rtner Integrations			

Integrate Partner Portfolio Holdings

section of this guide. Click "Save" once completed.

8

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!

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.

Intersect 🔿 Exclude 🔿 Add	
My Lists Equities	
CATEGORY	LISTS
Types	Basic Materials
Style	Communication Services
Exchanges	Consumer Cyclical
Indices	Consumer Defensive
Sectors	Energy
NAICS Sectors	Financial Services
NAICS Industries	Healthcare
Events	Industrials
Dividend Policies	Real Estate
Consensus Recommendation	▼ Technology
tems selected	CANCEL SUBMIT

- **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"

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"

YCHARTS

Rename

Close

Delete

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New Stock Screen (unsaved) ▼ Image: Save size of the second state of the second

Visit the YCharts Stock Screener

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"**.

Name	Enter name				
Гуре <u>(?)</u>	Rank				•
Financial M	letric	Is better	Null values	Weight	Fixed

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.

YCHARTS	Search	Q
Growth SMAs w/ QQQ Security Exposure	Activate Alerts	
\otimes Securities ୨ଖି MODIFY		
Add: Types > Fund (81000 results)		
Intersect: US Fund Categories > Large Growth (2607 resu	ults)	
Add: US Fund Categories > Small Growth (3521 results)		
Add: US Fund Categories > Mid-Cap Growth (4599 result	s)	
Intersect: Types > Separately Managed Account (1187 re	sults)	

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 I	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	ŵ	+	Nine Energy Service Inc	14.05	11.82	5.601	17.10	1.04
IMVT	ŵ	+	Immunovant Inc	18.20	16.28	8.518	20.24	3.145
GLYC	Ŕ	+	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	Ŕ	+	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	ŵ	+	89bio Inc	12.05	10.36	6.211	12.95	2.00
IPDN	Ŕ	+	Professional Diversity Network Inc	5.29	2.440	1.837	5.30	0.9202

Visit the YCharts Fund Screener

Scatter Plot



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"**.

Share Growth SMAS with	X
Anyone in: YCharts Staff	Cannot View
	Can View People can view and download
egories > Small Growth (3510 results)	Can Edit People can edit
egories > Mid-Cap Growth (4579 results	 Cannot View

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. Scatter Plot

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!

Excel Add-In

Fundamental | Charts

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"**.

My Lists	Equities	Funds	Indices			
CATEGORY				LIS	TS	
Watchlists				•	My Fund Screens	
Fund Scree	ns					
Stock Scree	ens					
Timeseries	Tables					
Model Port	folio Holdings	6				
Quickflow L	.ist					
Comp Table	S					

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".

earch for a financial metric			Q
CATEGORY		METRIC	
Popular Metrics		Risk	-
Income Statement		Alpha (vs Category) (3Y)	
Balance Sheet		Alpha (vs Category) (5Y)	
Cash Flows Statement		Alpha (vs Category) (10Y)	
Price and Valuation Multipliers		Beta (vs Category) (3Y)	
Returns and Performance		Beta (vs Category) (5Y)	
Risk		Beta (vs Category) (10Y)	
Means and Medians		Annualized Standard Deviation of Monthly Returns (3Y Lookback)	
Estimates		Annualized Standard Deviation of Monthly Returns (5Y Lookback)	
Technicals		Annualized Standard Deviation of Monthly Returns (10Y Lookback)	
		Max Drawdown (3Y)	
Institutional and Insider Holdings	-	Max Drawdown (5Y)	-
ems selected		CANCEL SUBM	IIT

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.

56 YCHARTS | COMP TABLES

Securities Data Pages

Economic Data

Excel Add-In

Custom Securities

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".
- Choose from categories like Performance, Fundamental, and Estimates to see all 3 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

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	Save		
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	Rename		
	Close		
Ū	Delete		

View in YCharts Comp Tables

Email Reports

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".
- Enter in the "Name" and "Type", then click "+Add Score Component". Add the 2 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.
- Once all weights sum to 100%, click "Add Score Column" to apply. Hit "Save" to use 4 at a later time.
- 5 To reference a previously saved model, click the "Scoring Models" dropdown then "Open saved model".

Name	Enter name.					
Туре <u>(?)</u>	Rank					*
Financial M	letric	Is better	Null values	Weight	Fixed	
CANCEL				SAVE A	DD SCORE COLU	MN



Generate Reports

- In the upper right corner, click "Export". Click "Download PDF" for the report. 1
- 2 Other options include "Export to Excel Add-In" or "Export Data" as a .CSV file.

ESG Fund	Performance							Di	ata as of Aug. 25, 202
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.
- Once complete, hit the "ADD COLUMN" button. 3

Column Title	Title			
Time Frame of Return	MM/DD/YYYY	MM/DD/YYYY		
Return Types	Select:	*		
Annualized	OFF ON			
			CANCEL	ADD COLUMN

Create Custom Return Periods

Email Reports

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 Securitie	es							
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	ŵ	+	Amgen Inc	20.36	5.068	35.95	15.19	10.64
AXP	ŵ	+	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	ŵ	+	Cisco Systems Inc	17.80	3.925	5.030	15.51	0.2205
CVX	ŵ	+	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

To add "Summary Stats", click the drop-down of the same name located 2 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

- 1 Once you've built a data table within **Comp Tables**, 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"**.

IIIdii	Share ESG Fund Performa	nce witl	h	×	
k Lis	Anyone in: YCharts Staff	•	Can Edit	•	
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al Re	turns (Daily)		People cannot vie	w or edit	

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.

i Email s Reports

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 highquality research with less time and effort.

Single Security & Comparison

See Quickflows in Action!

Email Reports

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!

Scatter Plot

Excel Add-In

Custom Securities

Overview

- CHARTS SUPPORT Alex Alerts Manager EMAIL ALERTS FREQUENCY: DAILY -CREATE FIRST PREV NEXT LAST **V**FILTER Showing 1 - 5 of 5 items with Alert Alert Type Туре Last Triggered Stocks Stock ØÛ B GOOG (1) Funds Watchlists Indicator May 9, 2022 ØŪ I:BTCUSD (1) Model Portfolio Indices ØŪ E Large Growth Funds (1) Watchlis Indicators ØŪ Screeners TSLA (1) Stock Investment Strategy October 24, 2022 ØĪ H VIX (1) Index Financial Metrics Ľ٩ ADD APPLY FILTERS Clear filters
- 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.

Fundamental Charts

Scatter Plot

Alerts Manager

Securities Data Pages

Economic Data

Excel Add-In

Custom Securities

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.

Alerts for Large Growth Funds ×					
Create a New Metric Ale	rt				
METRIC	OPERATOR	ł	NUMBER OR METRIC		
Enter Metric	Ca <=	*	Enter Metric or Value	TE	
System Alerts					
New Financial Stater	nent data is available	for stor	cks on this watchlist		
New Events (Earning	s, Dividends, etc.) are	availab	le for stocks on this watchlist		
New News is availab	le for stocks on this v	vatchlist	t		
Pro Y-Ratings change	of or stocks on this wa	atchlist			
Pro Value Scores cha	ange for stocks on thi	s watch	list		
Pro Fundamental Sco	ores change for stock	s on this	s watchlist		
		weetme	nt Strategy		

Visit the YCharts Dashboard

- 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.</p>
- 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.
- Enter a security into the "Create a New Alert" search bar. 2

	ert				
METRIC	0	PERATOR	NUMBER OR METRIC		
Enter Metric	Ca <	- •	Enter Metric or Value	۲ą	CREATE
EXISTING METRIC ALERTS					
Alert me when GOOG's	Price Target <=	Price			ΟŪ
System Alerts					
 New Financial State 	ement data is a	vailable for this	stock		
New Events (Earning)	gs, Dividends,	etc.) are availab	le for this stock		
New News is available	ble for this sto	ck			
Pro Y-Rating change	es				
Pro Value Score cha	anges				
Pro Fundamental So	core changes				
		ont Stratogy			

- 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.
- Additionally, the "System Alerts" section provides you additional options to notify 4 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



Excel Add-In

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.

Economic Data

Excel Custom Add-In Securities

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.

CHARTS		Search		Q	DATA TOOLS	S SUPPORT			5	• 🐖 (ì	0
ocks											
Indices Data as of 02/07/202	23 15:09										_
10 50 114 014 41	W VTD 1 9V 5V 10					INDEX		LEVEL	1 DAY CHG	1 DA)	r % Cł
10 50 TM 3M 67	M FID IT 37 37 10	T MAA			15.00%	• Dow		33996.40	+105.38		0.31
						NASDAQ		12016.24	+128.79		1.08
Martin Contraction	MAY 22	SEP 2		Straft	0.00% 3.12% 8.00% -14.77% -30.00%	 <u>S&P 500</u> 		4140.50	+29.42		•0.72
Performance by Index (?))									EDIT	INDI
Dow Jones Industria	al Average Nasdaq	-100 S&P	500 Russell 1000 (Growth	Russell 2000						
1D 5D 1M 3M 6M	M YTD 1Y 5Y 10Y M	IAX					Events		YESTE	RDAY TODAY UPC	OMI
DOW JONES INDUSTRIAL	AVERAGE: 33996.40 + +14	492.42 (+4.59%)					DATE	TIME	SYMBOL	TYPE	_
Top Gainers							02/08/23		DIS	Earnings	_
NKE	BA		DOW		AXP		02/08/23	16:30 EST	DIS	Earnings	
+29.81 (+31.26%)	+48.18 (+29.2	25%)	+11.11 (+22.56%)		+32.07 (+21.95%)		02/09/23		IBM	Dividends	
CRM	٧		MSFT		HD		02/09/23		V	Dividends	
+29.60 (+20.95%)	+32.68 (+16.4	48%)	+36.81 (+15.98%)		+44.62 (+15.93%)		02/10/23		AAPL	Dividends	
Top Losers							02/14/25		AMGN	Eorningo	
UNH	AMGN		CVX		MMM		02/14/23	08:30 EST	KO	Famings	
-62.97 (-11.69%)	-25.17 (-9.369	%)	-14.07 (-7.51%)		-8.34 (-6.68%)		02/15/23	00.00 201	CVX	Dividends	
JNJ -8.10 (-4.74%)	MCD -6.66 (-2.44%))	WBA -0.80 (-2.13%)		HON -3.82 (-1.83%)		02/15/23		MSFT	Dividends	
Pulling Up The Index	As of 02/07/2023 15:23						News				
BA +48.18 (+29.25%)	+307 HD +44.62 (+15.9	+3 93%)	MSFT +36.81 (+15.98%)	+234	V +32.68 (+16.48%)	+214	Google Bard e investment in Yahoo, 02/07	nters the A.I. battle ChatGPT 15:21	ground as Micros	soft steps up	
AXP +32.07 (+21.95%)	+212 NKE +29.81 (+31.2	(+2)	CRM +29.60 (+20.95%)	+195	CAT +23.37 (+10.34%)	(+153)	Microsoft Add Yahoo, 02/07	ls ChatGPT AI Tech 15:21	nology to Bing Se	arch Engine	
🔌 Pulling Down The Ind	ex As of 02/07/2023 15:23						This is the be Yahoo, 02/07	st way to understan 15:17	d where stocks a	re headed	
UNH -62.97 (-11.69%)	-411 AMGN -25.17 (-9.365	3)	57 CVX -14.07 (-7.51%)	-90.6	MMM -8.34 (-6.68%)	-55.4	Why tech bos Yahoo, 02/07	ses are doomsday.p 15:09	repping		
JNJ -8.10 (-4.74%)	-53.9 MCD -6.66 (-2.44%)	(43	5 HON -3.82 (-1.83%)	-24.9	WBA -0.80 (-2.13%)	(-5.32)	Biden to Seek Yahoo, 02/07	New Taxes on Billio 15:09	onaires, Share Bu	ybacks in Address	
Points contributed to the inc	dex's level are estimates						Is It Time to B	uv the Dow Jones'	3 Worst-Performi	nn January Stocks	,

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 highestreturning 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.

	Search	QD	ATA TOOLS	SUPPORT			(i) □ 12
ual Funds for United States -							
erformance by Style (?)							
Equity Style Fixed Income Style							
1M 3M 6M YTD 1Y 3Y 5Y 10Y 15Y							
Large Cap/Blend 3.54%			Large Cap/Growth 8.09%				
			Large Cap/Value 1.69%		Mid Cap/Growth 8.10%		
					Small Cap/Blend 8.14%	Mid Cap/Blend 5.30%	
						Mid Cap/Value	Small Cap/Growth
						3.03%	Small Cap/Value
Allocation Commodities In M 3M 6M YTD 1Y 3Y 5Y 10Y 15Y 19Y 15Y	ternational Equity Municipal Bond	Taxable Bond	US Equity				EDIT BROAD ASSET C
Allocation Commodities In 1M 3M 6M YTD 1Y 3Y 5Y 10Y 15Y op Gainers	ternational Equity Municipal Bond	Taxable Bond	US Equity				EDIT BROAD ASSET C
Interview Sector Asset Class (?) Allocation Commodities Int 1M SM 6M YTD 1Y SY SY 10Y 1SY Op Gainers IIIPAAX Interview IIIPAAX Interview	ternational Equity Municipal Bond VALIX Value Line Capital Appreciation Investor 12.53%	Taxable Bond Ba 10	US Equity VBIX on WealthBuilder Institu 8%	tional	Aï Att 9.	FCIX AC Rotation Institutional 71%	EDIT BROAD ASSET C
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erformance by Broad Asset Class (?) Allocation Commodities In M 3M 6M YTD 1Y 3Y 5Y 10Y 1SY obp Gainers IIPAAX Integret Asset Anotenen Plus RCEAX RCEAD RCThs Brothers brokers brokers Commodities Comm	ternational Equity Municipal Bond VALIX Value Line Capital Appreciation Investor 12.53% Fainformer Allocation 7.96%	Taxable Bond Ba 10 You 7.9	US Equity VBIX on WealthBuilder Institu 8% MAX Idown Master Allocation 4%	tional Institutional	AT AT, 9.2 M MB 7.3	TCIX AQ Rotation Institutional 71% HELX Elite Small Cap Fund of %	EDIT BROAD ASSET C
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View Mutual Funds Data in YCharts

73 YCHARTS | SECURITIES DATA PAGES

Scatter Plot

Excel Add-In

Email Reports

Tour YCharts' Economic Data Sets

The best investment strategies use assumptions based on highquality 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.

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POPULATION
336.05M
1.412B
343.07M
125.68M
83.20M
67.33M
67.75M
59.11M
32.01M
47.42M
VIEW ALL
60.10
-2.70%
-2.80%
9:00 AM EST
4:30 PM EST
10:00 PM EST

View Economic Data in YCharts

Custom Securities

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.

02/06/20	23 F	REV W	IEEK 1	ODAY NEXT	TWEEK									WEEK VIEW	DAY VIEW
5 Feb. Sun	day			6 Feb. Monda	ų	7 Feb. Tuesday	8 Feb. Wednes	day	9 Feb	Thursday		10 Fet	o. Friday	11 Feb. Saturday	
0 Events				14 Events		3 Events	2 Events		7 Event	\$		9 Event:	3	0 Events	
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eb. Mond	ay														
:00 EST	E:	-	German	y.	Germany Consu	mer Price Index MoM		Jan 2023		Monthly	-		-0.82%	-	-
:00 EST	C7	-	German	y.	Germany Consu	imer Price Index YoY		Jan 2023		Monthly	-		8.60%	-	-
:00 EST	E:	-	German	y.	Germany Harm	onised Consumer Price Index MoM		Jan 2023		Monthly	-		1.21%		-
:00 EST	67	-	German	y	Germany Harm	onised Consumer Price Index YoY		Jan 2023		Monthly	-		9.60%	-	-
:00 EST	C,	0	Eurozor	ie	Eurozone Retail	Trade MoM		Dec 2022		Monthly	-2.7	70%	1.20%	-	-
:00 EST	C‡	0	Eurozor	le	Eurozone Retail	Trade YoY		Dec 2022		Monthly	-2.8	30%	-2.50%		
:00 EST	67	•	Canada		Canada Ivey PN	1		Jan 2023		Monthly	60.	10	49.30	21.91%	-7.40%
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:00 EST	₽.	9	China		China Exports Y	'oY		Jan 2023		Monthly	-		-10.11%		-
OO EST	67	•	China		China Imports (NY YoY		Jan 2023		Monthly	-		2.39%		
:00 EST	C.	0	China		China Imports \	/oY		Jan 2023		Monthly	-		-7.30%	-	-
:00 EST	C.	-	China		China Trade Bal	ance		Jan 2023		Monthly	-		78.01B USD		
2:00 EST	C.		China		China Trade Bal	ance		Jan 2023		Monthly	-		550.11B CNY	-	

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.
- To download, simply click any of the various templates available. From here, modify 2 and update your workbooks as desired.
- The templates for Economic Indicators can be found in the "Macroeconomics" 3 section which includes: "Market Update", "G20 Macroeconomic Snapshots", "Macroeconomic Overview Template", and "Treasury Yield Curve".



View the Excel Add-In Templates

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.

YCHARTS	Search Q DATA TOOLS SUPPORT	🛠 (Ì) 🚺 Alex
Resources < Support Topics	Question	s? Contact Us!
Resources < Support Topics FAQ Quick Tips Webinars Economic Summary Deck Product Tutorials Product Tutorials Product Release Notes Fund Flows Reports Integrations Case Studies YCharts Blog Monthly Market Wrap	Q4 2022 Economy Summary Deck We've aggregated several key economic and market indicators from the fourth quarter of 2022 into a useful slide deck. Speaker notes are undedded for informational use and refer free make modifications to suit your needs. If you have additional questions, please reach out your dedicated account manager. Image: Ima	 contact Ust c
	Q1 2020 Economy Summary Deck Q2 2020 Economy Summary Deck D3 2020 Economy Summary Deck	× ×
	Q4 2019 Economy Summary Deck Q3 2019 Economy Summary Deck	~
	Q2 2019 Economy Summary Deck	~

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!

Email Reports

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.

cel	
ownload and Access Templates Help	
Jpgrade to YCharts Excel Add-In 4.2	Your Excel Add-In
Dur records show that you last downloaded YCharts Excel Add-In /ersion 3.26. Upgrade to the latest version for the best possible xperience.	Access Key:
Requirements: Windows only, Excel 2010 or later.	Your Monthly API Data Usage
mportant: The Excer Add-In is available in two versions: 52-bit and 04- bit. The version you install must match your installation of Office.	For the period of Dec 6 - Jan 5, 2022: You've requested OMB of the allowed 500MB
How do I know whether I'm running a 32-bit or 64-bit installation of Office?	per month
I'm running a 32-bit version of Office (most common)	
) I'm running a 64-bit version of Office (only possible with Office 2010 and higher)	
▲ DOWNLOAD EXCEL ADD-IN 4.2 (32-BIT)	

View the Excel Add-In Homepage

Pre-built Templates

- Once you've installed the Excel Add-in, a number of prebuilt templates 1 are available for you to use. From the Excel homepage, navigate to the Templates tab.
- To download, simply click any of the various templates available. Modify 2 and update your workbooks as needed from here.
- Some of the most popular templates available include: "Market Update", "Model 3 Portfolio Comparison", "Portfolio Overview", "Portfolio Side by Side Comparison", "Portfolio Withdrawal or Contribution Overview", and "Top Holding Analysis".

	Search	۹ 🖓) =
xcel			
Download and Access	Templates	Help	
cel Templates To Get	You Started		
d-in. Modify the tem mbols.	plates to suit	your analysis needs or use them as is by simply changing the ticker	IS EXCe
Model Portfolio Compa	rison		
Visualize your firm's moo risk, and visualize the ris	del portfolios in sk vs return.	a single report. Compare each model portfolio's asset allocation, performance,	ସ
Visualize your firm's mor risk, and visualize the ris Portfolio Overview Template provides a cor	del portfolios in sk vs return. nprehensive ove	a single report. Compare each model portfolio's asset allocation, performance, rview of a portfolio and generates a clean, printable report.	ସ

View the Excel Add-In Templates

Email Reports

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.



Email Reports

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**.

Getting Started Guide (I	PDF)
Provides system require	ments, Installation steps, and other useful information when you are getting the Add-in set up for the first time.
Formula Syntax Guide (XLSX)
Provides the syntax of t	he various formulas and describes the parameters that must be provided. Various examples illustrate the use of the formulas for
mporting different kind	s of data.
Quick Reference of Met	ric Codes (PDF)
The most common metr	ics in our system, organized into familiar categories.
Complete Reference of	Metric Codes (XLSX)
A complete reference of	all the metric codes available through the YCharts Excel Add-in.

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!

Securities [Data Pages

Economic Data

Excel Custom Add-In Securities

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.

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Uplo	ad Data from	a.X	LSX or .CS	SVI	File	
Example	es of accepte	d dat	te and valu	ie f	ormats	
DAILY RETURNS			DAILY LEVELS			
Date	Value		Date		Value	
1/1/2018	5.00%		1/1/2018	1234567890.1234		
1/2/2018	5.35%		1/2/2018		1234567890.12	
MONTHLY RETURNS	6		MONTHLY LEV	/ELS		
Date	Value		Da	ite	Value	
JAN-2018	0.0500		1/31/20	18	1000.1234	
FEB-2018	0.1000		2/28/20	18	1000.12	
ANY RETURNS			ANY LEVELS			
Date	Value		Da	ite	Value	
12/31/2018	7.35%		1/7/20	19	100542	
3/31/2019	12.34%		1/14/20	19	100924	

Excel Add-In

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.

Securities Data Pages

Economic Data

Excel Add-In

Custom Securities

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.

OWNER ☑ Me	
Name includes	Q
BENCHMARK	
Search	
WATCHLIST	
Search	
APPLY FI	LTERS
Clear filters	

Email Reports

Excel Add-In

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

- **5** 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..

View all			_	
	Fund Summary - Equity D			
	DESCRIPTION			
	Summary of returns for major equity funds in several catego	ries. 🖉		
	FREQUENCY (?) O Daily • Weekly O Monthly	O Quarterly		
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	List: Asset Class Majors > International Equity Major Fund	ls		
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	Fundamental Chart			6
	Chart: Drawdown Chart: Large Cap Value Funds			

Economic Data

Excel Add-In

Custom Securities

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".

SORT BY: M	ost Recently Edited First 🔻	
_	Fund Summary - Equity Frequency: Weekly Last edited: Aug 25, 2021 Summary of returns for major equity funds in several categories.	SUBSCRIBE
	Fund Summary - Fixed Income Frequency: Weekly Last edited: Aug 22, 2021	0 -
_	Summary of returns covering some of the large fixed income funds in seve categories.	SUBSCRIBE
	YCharts Weekly Market Pulse	Ø
_	Frequency: Weekly Last edited: May 10, 2021	
	Current YCharts weekly review.	✓ SUBSCRIBED ▼
	Economy Update	0 -
	Frequency: Weekly Last edited: May 10, 2021	
_	Report includes past and upcoming releases for major Economic data.	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.

TITLE
YCharts Weekly Market Pulse 🖉
DESCRIPTION
Current YCharts weekly review. 🖉
FREQUENCY (?). Daily Weekly Monthly Quarterly
+ ADD MODULE
Visit YCharts Email Reports

Dashboard Fundamental Charts

Excel Add-In

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

Scatter Plot

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.

Calendar	of major companies that are due to	o report	earnings or pay divid	ends.
lect a Secu	rity List			
My Lists	Equities			
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Fund Screens		Shared Fund Screens		
Stock Screens				
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Model Por	tfolio Holdings			
Quickflow	List			
Comp Tabl	es			

Visit YCharts Email Reports

Scatter Plot

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!

Custom Securities

Email

Reports

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.

im Email ties Reports

Email

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
- Report History
- Report Branding
- Share Groups
- User Preferences

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.

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.

Scatter Plot

Economic Data

Excel Custom Add-In Securities