

# Tableau Handbook

12/03/2019

After logging in and landing on the [homepage](#), you would be able to utilize the following functions:

## Portfolio

# Attribution

## Absolute Contribution

To obtain the absolute contribution information, enter the Portfolio Attribution section, activate the Fund Attribution Details tab, and select the desired data type, fund name and index (circled in red).

## Relative Effect

To see to the relative effect view, switch the data type to Relative Effect (circled in red).

## Benchmark

To see to the benchmark sector information, switch the data type to Benchmark (circled in red).

## Win/Loss Ratio

You can find the hit ratio, the win/loss ratio and some other statistics of the funds in the Selection vs Construction tab by selecting the desired fund and index in the circled dropdowns.

# Performance Visualizer

## Fund Performance

Click the fund name on the left side to highlight the fund and its benchmark

## Fund Relative Performance

To see the rolling relative performance of a fund, switch the chart type to a relative rolling one in the circled dropdown.

## Volatility Scatter Plot

You can see the annual returns of the funds vs their volatilities if you switch to the volatility scatterplot chart

# Quant Factors

## Quant Factor View for factor performance YTD

The quant factor view provides visualized factor performance data for top and bottom factor quintiles. If only a small number of factors are desired on the view, simply select the desired factors by clicking on them while pressing the Ctrl button.

## Quant Factor performance for 20 year history

To see the rolling relative performance of the factors, switch the chart type to a relative rolling one in the circled dropdown.

# Cash Blotter

## Cash Blotter

The cash blotter view provides cash related information for all funds. By scanning the net subs reds column, you can quickly see fund flows as a percentage of the fund size.

## Fund Flow

To check the fund flow data over the past quarter, simply activate the Fund Flow tab. Hovering the cursor on the bars shows weekly data over the past couple of years.