



# Interactive Portfolio Management

**SEI** New ways.  
New answers.®

Username:

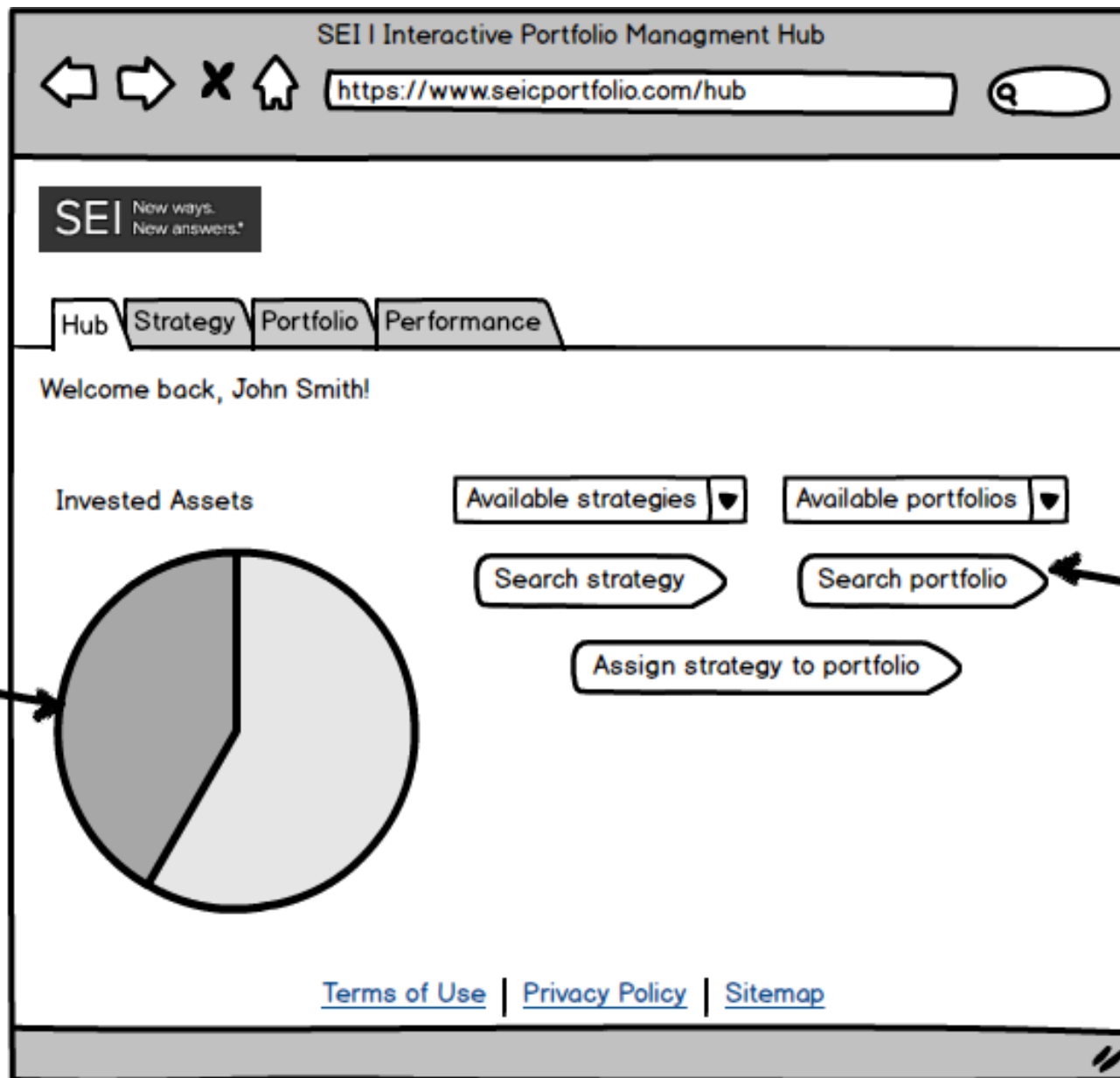
Password:

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Pie-chart will display types investments

Buttons will instantiate pop-up with description



SEI New ways.  
New answers.\*

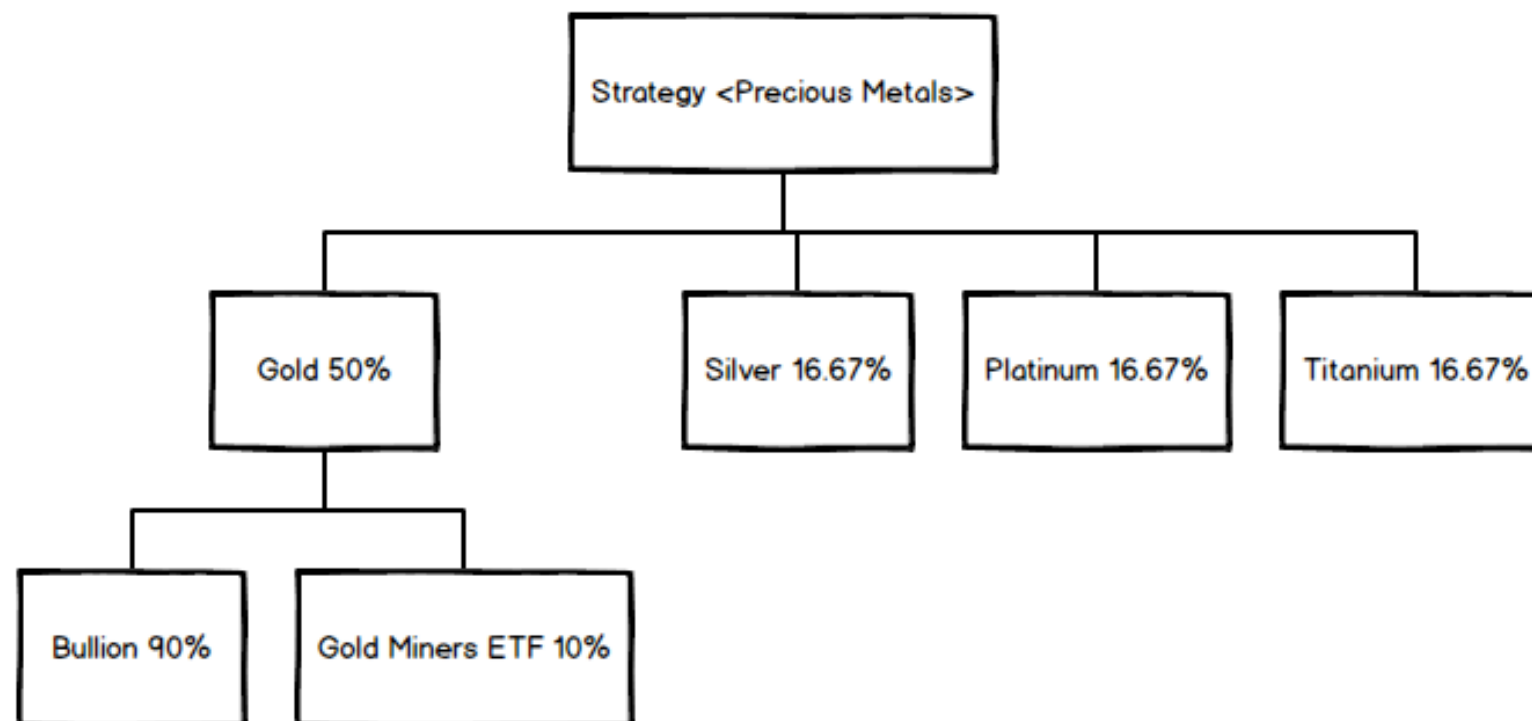
Hub Strategy Portfolio Performance

Strategy <Precious Metals> ▼

+ Add Node

Modify Strategy: Off

Rebalance Strategy



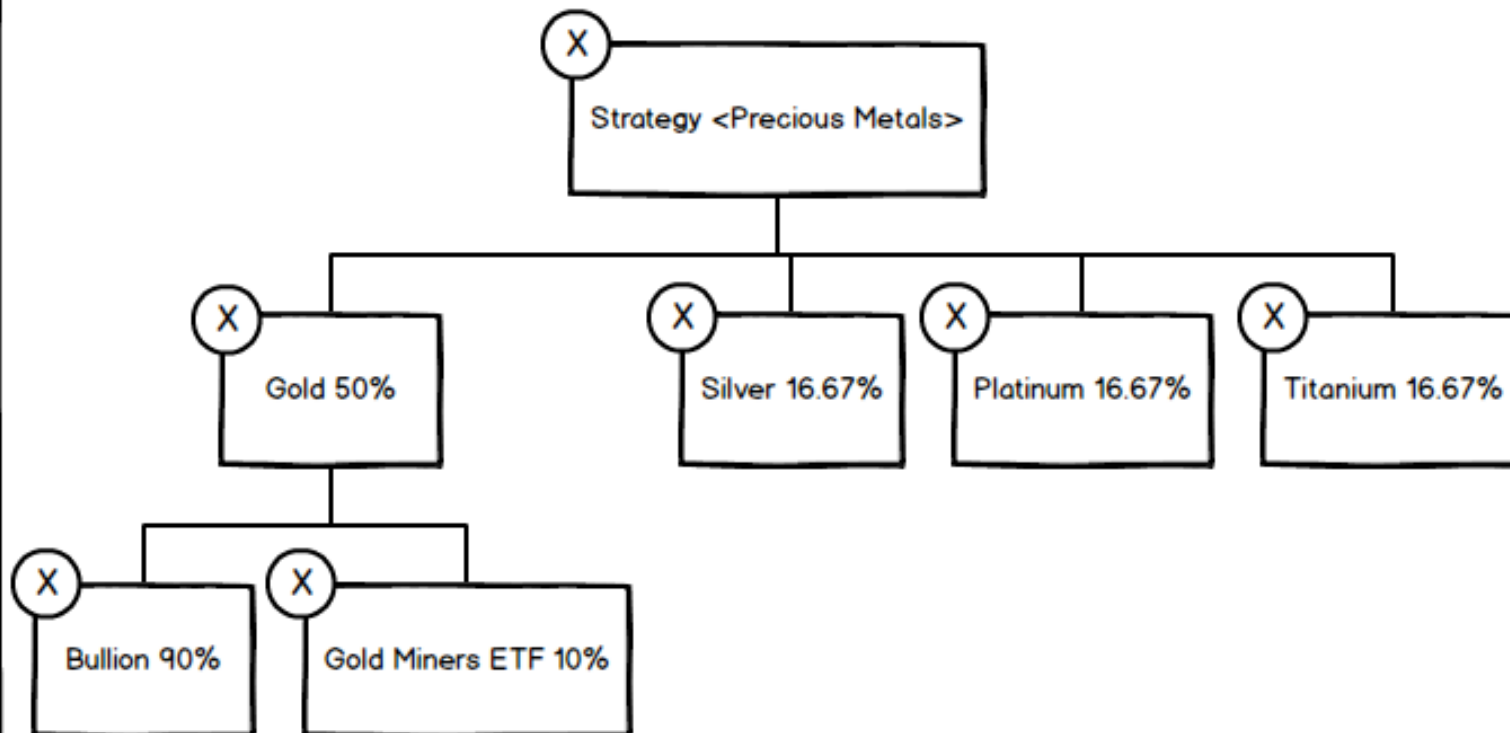
**SEI** New ways.  
New answers.\***Hub** Strategy Portfolio Performance

Strategy &lt;Precious Metals&gt; ▼

+ Add Node

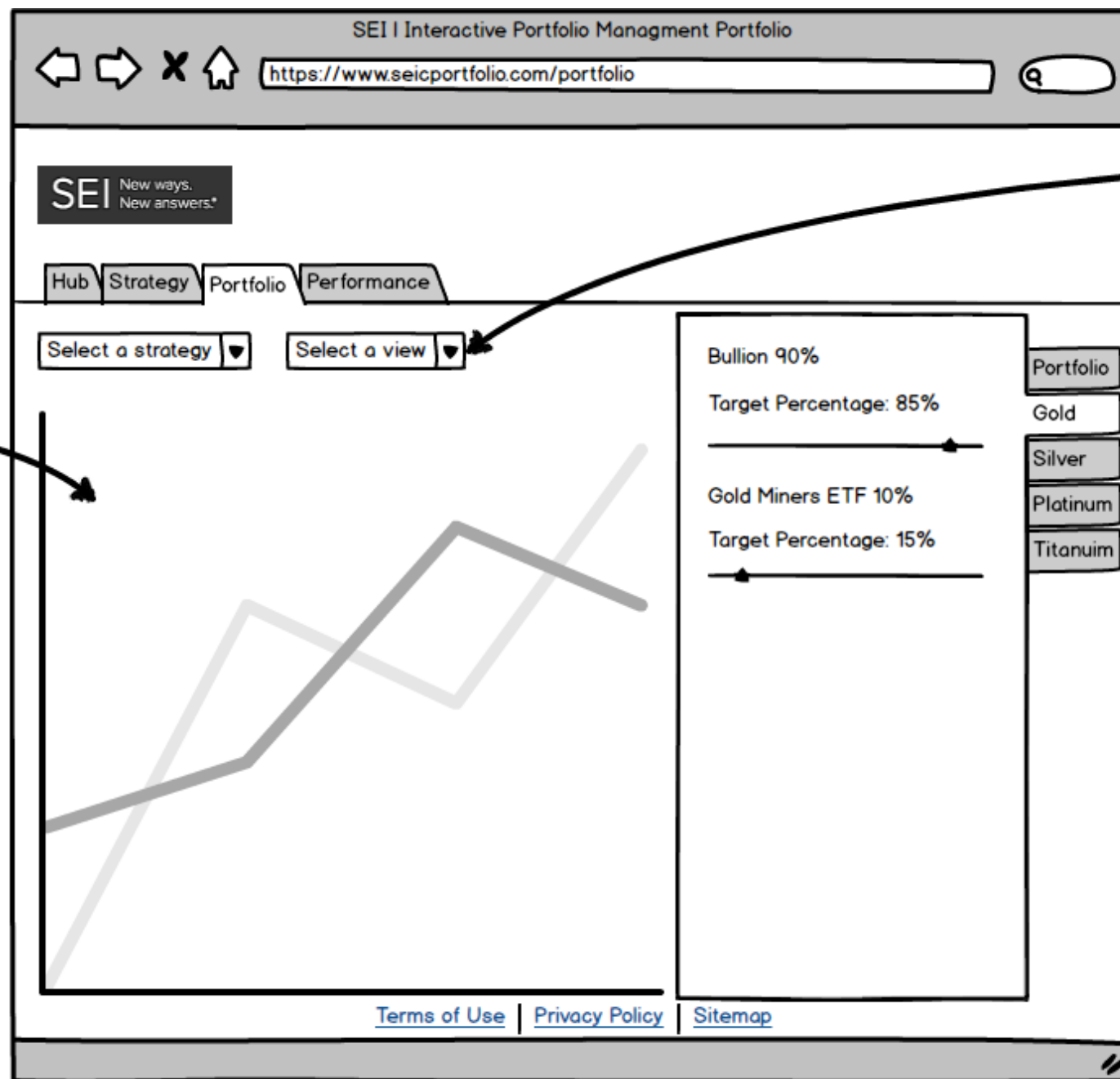
Modify Strategy: On

Rebalance to Strategy

**Alert**Are you sure you would like to  
rebalance your strategy?

No

Yes



Strategy vs.  
Portfolio  
performance

View nodes  
versus each  
other, node  
versus  
portfolio, etc.

Portfolio will  
contain % of  
Gold, Silver,  
etc.