PORTFOLIOS AS SECURITIES



PRE-COMPUTED ANALYTICS

The most popular indicators available in PORT are pre-computed for Tickerized Portfolios.

ASSET CLASS SPECIFIC CHARACTERISTICS

Specific portfolio-level characteristics are pre-computed for each asset class: e.g. Price/Earnings ratio, Price/BookRatio and Estimated Dividend Yield for equity Portfolios, OAD, OAS and Aggregate Rating for Fixed Income portfolios.

BENCHMARK-RELATIVE ANALYTICS

Relative performance and risk are computed against the defined benchmark.

HISTORICAL DATA & BACKFILLING

Indicators are computed daily and cumulated in historical time series. Optionally, indicators' histories are backfilled since portfolio inception.

COMPREHENSIVE DES < GO > PAGE

All the pre-computed indicators are displayed in a new portfolio-specific DES <GO> page.

CHART ALL THE INDICATORS WITH GP < GO>

All the pre-computed historical indicators are available for charting in GP <GO> or G <GO>. Invoke GP <GO> directly from the customized DES <GO> page.

Bloomberg





Analyze tickerized portfolio returns using standard terminal functions such as TRA <GO> or HRH <GO>.



TRACK PORTFOLIO PERFORMANCE

Compare and correlate the performance of tickerized portfolios against any index using standard terminal functions such as BETA <GO> and COMP <GO>.



GRAPH AGGREGATED FUNDAMENTALS

Chart pre-computed aggregated fundamentals for tickerized portfolios with standard terminal functions such as GF <GO> or GP <GO>.



MONITOR PORTFOLIO GROUPS

Instantly compare tickerized portfolios to indexes, funds, and ETFs using Launchpad Monitors.

LEARN MORE

If interested in being enabled for tickerization, please contact your Bloomberg Account Representative. For additional information, press the <HELP> key twice on the Bloomberg Professional® service.

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