

Portfolio Summary

Total Value
\$40,000

Holdings
3

Navigation

 [Portfolio Input](#)



Portfolio Analyzer

Backtest your portfolio, find the best model, and optimize your fees



Portfolio Input

Enter your investment holdings and the advisory fee paid to manage these investments. The analysis will determine the best matching model portfolio and provide a detailed comparison.



Advisory Fee

Annual Advisory Fee
(%)



Total Portfolio Value

\$40,000

1.00

-

+






Import from E*TRADE

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🔄 Start Authentication

👛 Current Holdings

Investment Symbol	Investment Name	Current Market Value (\$)	Asset Class	Delete
IEUR	iShares Core MSCI	20000 - +	Internation... ▼	
VOO	Vanguard S&P 500	10000 - +	US Equities ▼	
PULS	PGIM Ultra Short B	10000 - +	Core Fixed I... ▼	

+ Add Holding

🔍 Analyze Portfolio