



Portfolio Management

Upload

Create New

Portfolio

Watchlist

Portfolios

Asset Class

Equity/Fixed Income/Mixed Filter

Portfolio Name

Overview

Analyze

Edit Portfolio

Delete Portfolio

Export

.csv file

Analyze

Securities

Analyze

Edit Portfolio

Delete Portfolio

Export

.csv file

Analyze

Delete

Watchlists

Data Sets

Export Factor References

.csv file

Export

All

Current

.xlsx file

Issuer (Select data set)

List of data sets

Alerts

Factor Alerts

Add Factor Alert

Select Factor

List of Factors

All Issuers

Custom Universe

Add Portfolio(s)

Add Watchlist(s)

Add Index(es)

Search

Association Alerts

People

Cases

All Issuers

Custom Universe

Add Portfolio(s)

Add Watchlist(s)

Add Index(es)

Search

Screen Alerts

Add Screen Alert

Select Screen

List of Saved Screens

Add Portfolio(s)

Add Watchlist(s)

Add Index(es)

Save