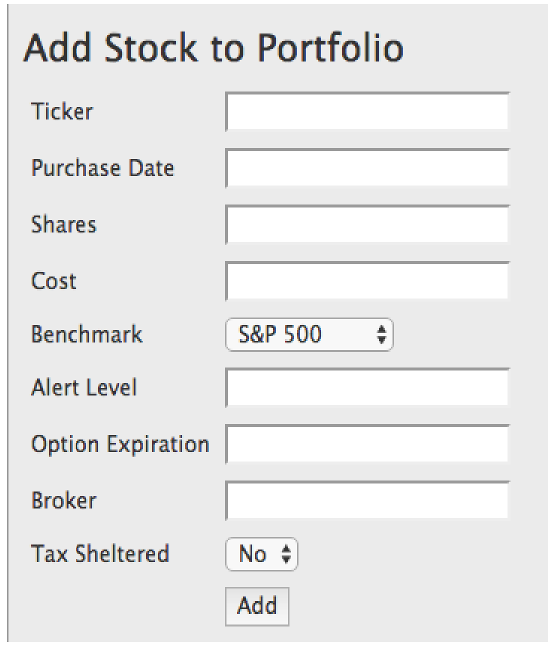
Portfolio

This is the screen used to add securities to you portfolio.

- Ticker, Purchase Date, Shares, Cost and Benchmark are all basic fields and are all required.
- Alert can be left blank if you do not want alerts send to you.
- Option Expirataion Date lets prevents alerts from being sent.
- Broker is optional. Can be used to group and sub-total Portfolio report in a spreadsheet.
- Tax Sheltered.



If you have a portfolio, it will show as an option in the Stock Universe drop-downs.