

Generic Holdings - Performance

Last Modified on 25/09/2023 12:10 pm BST

This article is a continuation of [Generic Holdings - Assets](#)

The Performance tab lists all valuations completed (manual or through electronic valuations) against the holding.

The screenshot displays the 'Performance' tab for a holding. The table below shows the performance record:

Performance Id	Date	Value	Last Modified By
P-004198	25/09/2023	£230,846.14	Amy Paulsen

For more information on the valuation, click into the **Performance Id**:

The close-up shows the table with the following data:

Performance Id	Value	Last Modified By
P-004198	£230,846.14	Amy Paulsen

The performance record will include the **Value**, **Modified Date**, **Date Created** and **Type**:



Performance
P-004198

Holding	Client	Value
Test Personal Pension Fully Insured	Test Client	£230,846.14

Details

Performance Id	Date
P-004198	25/09/2023
Value	Type
£230,846.14	Current Valuation
Last Modified Date	
25/09/2023, 11:15	

For further information on Holdings, see article: [Generic Holdings - Charges](#)