Can I produce a Portfolio report?

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You can generate a report about a portfolio by viewing the portfolio settings and then clicking on the **Report** button at the bottom of the pop-up screen.

Portfolio det	ails			🕫 Bac	sk to fund l	ist Save as	POF Grap	h portfolio	Graph cor	stituents	Fund fact	sheets S	ettings Heli
Choose the infor Basic details													
Ben Reynolds:	Balance	d Portfolio											
Portfolio name Benchmark: Valuation type		Freedom L Synthetic	Balanced Port K All-Stock TR Senchmark	folio									
The holdings are	e are trea	ted as a pseudo-t	enchmark: the po	rtfolio is valued a	as though it	t is reweight	d every mor	nth so that t	he split be	tween each	fund rema	eins consta	nt.
Portfolio past p	erform	nce											
Cumulative pe	ef. 56	Benchmark		Percentag	e gain/los	s in each 1	-month pe	riod (most	recent fir:	st)			
1 year	-0.40	0.05		Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Yr 7	Yr 6	Yr 9	Yr 10
2 years	7.67	5.34			8.10	17.39	10.85						
3 years	26.39	24.60											
4 years	40.10	44,95											
5 years	37.36	36.96					_						
6 years					_								
7 years													
5 years													
				_				_					

The report about a portfolio consists of the following parts:

- The name of the portfolio, and the benchmark you have defined for it.
- The portfolio's performance, in cumulative terms and in each discrete annual period.
- Statistics about the portfolio showing information such as its overall volatility and Sharpe ratio, and its alpha and beta relative to your chosen benchmark.
- The performance of each individual constituent of the portfolio, relative to the average performance of the portfolio as a whole.
- The combined asset allocation of the portfolio, showing the value by asset class (e.g. equities, bonds) and in each geographical area and industry sector.

Links to other pages

The links on the menu bar of the portfolio report (asillustrated by the screenshot above) provide a number of options:

- Save the report in PDF form.
- Graph the performance of the combined portfolio.
- Graph the performance of the individual constituents.
- Generate a fund factsheet for each individual constituent.

Change the portfolio settings (the holdings in each fund, the benchmark etc.).