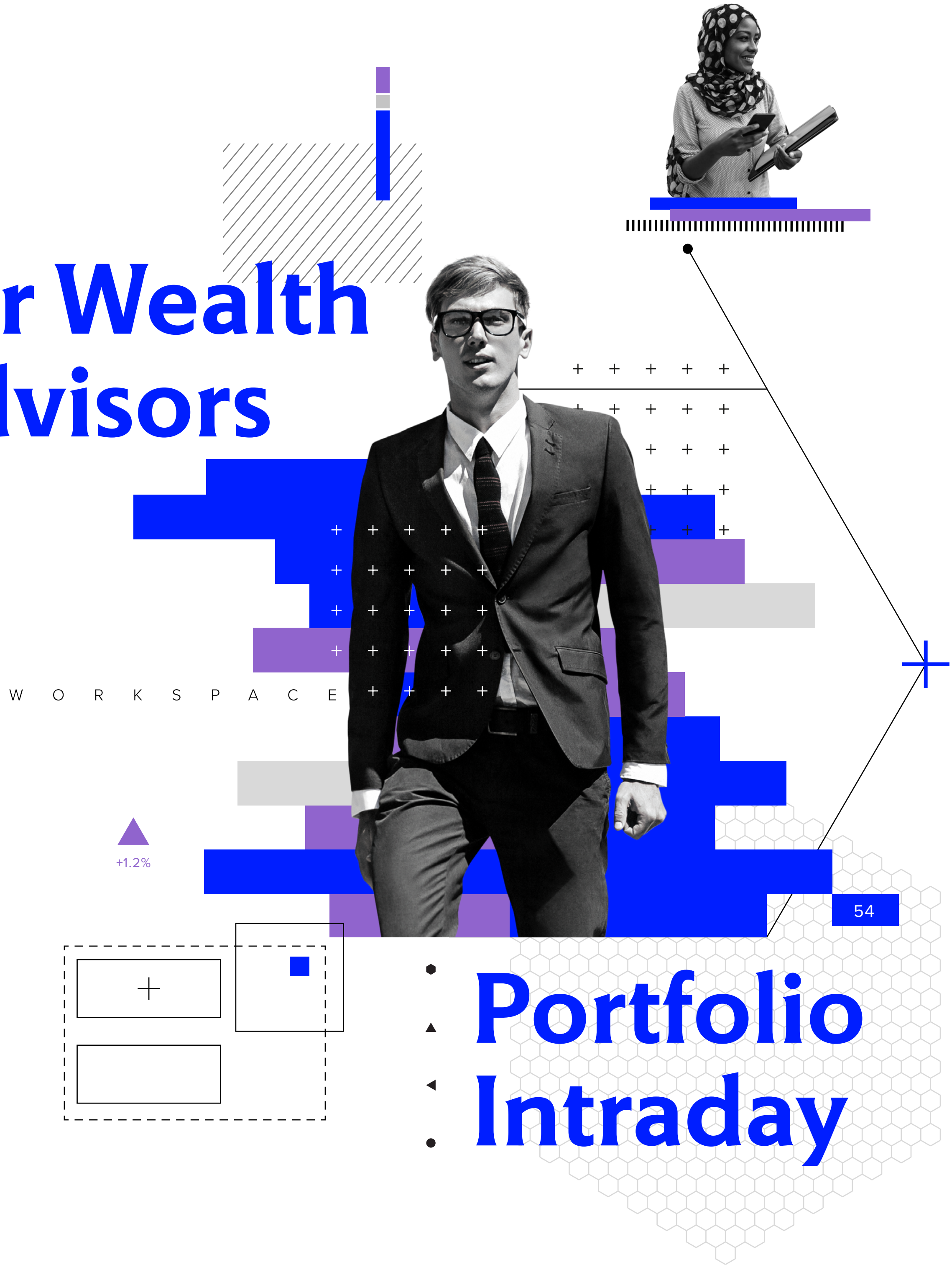
LSEG Workspace

For Wealth Advisors



Portfolio Intraday

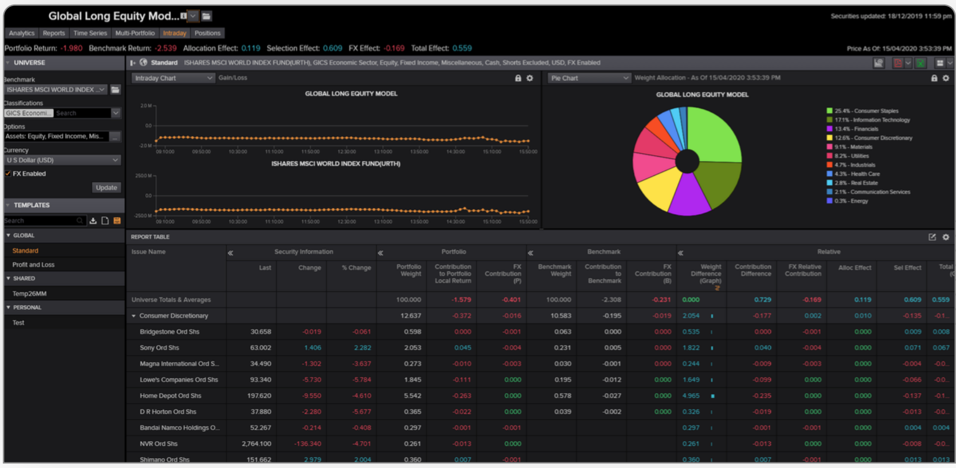
LSEG DATA & ANALYTICS

1. Why should I use the app?

Portfolio Intraday allows users to monitor a multi-asset portfolio in real time throughout the day. Accompanied by key visualisations, it enables you to make timely, effective decisions on your portfolio.

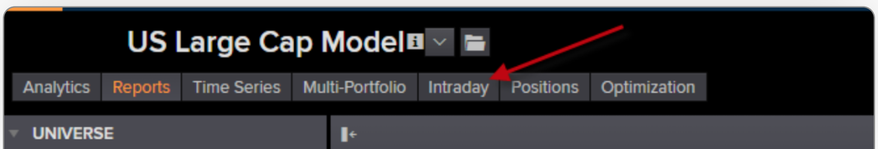
2. Key facts

- View your portfolio performance and positioning in real time, or near-real time, to monitor and understand changes in your portfolio across the day
- Supporting charts give you the ability to add data visualisations to your templates
- 'What if' functionality supports investment decisions by allowing you to analyse the impact of potential portfolio changes

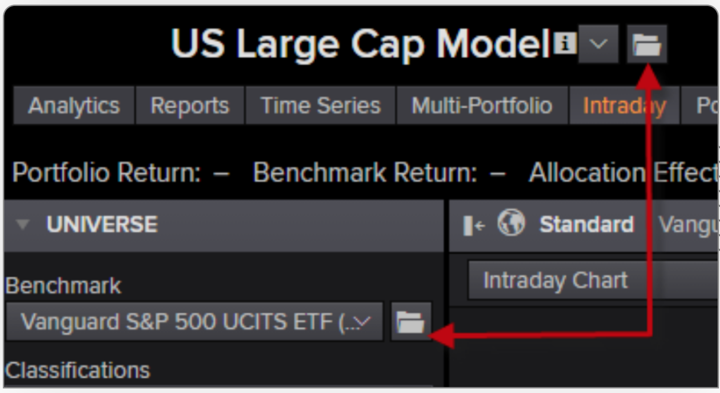


3. Top tips for using the app

- Enter **INTRA** in the search bar and select **Intraday**, or launch from directly within Portfolio Analytics by selecting the **Intraday** tab

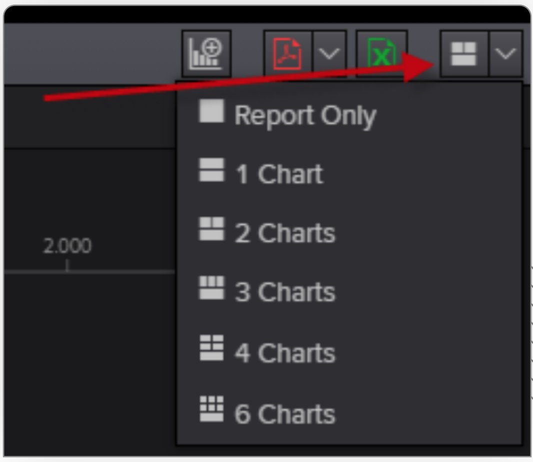


– Select your portfolio and benchmark (opens PAL Manager)

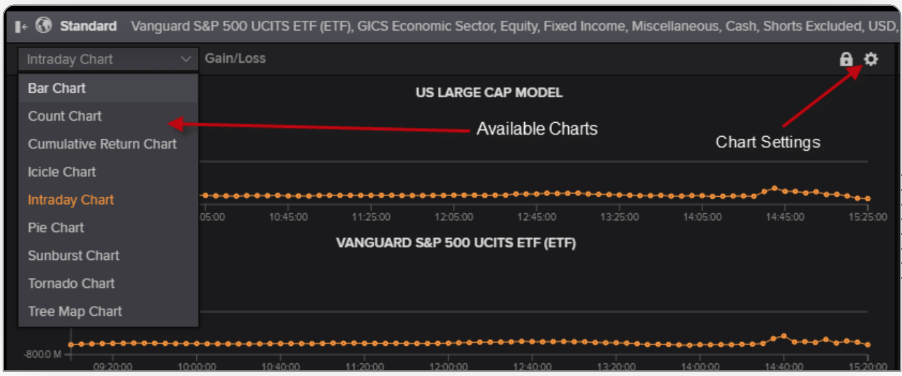


– Select your universe settings, such as time period and classification. The ‘Options’ settings include additional options such as exclusion/inclusion settings, and for portfolios’ holding funds, the ability to select **Expand Composite Assets**, which allows you to look through to the underlying holdings

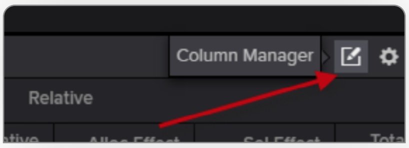
– Select your page format in the top right of the screen

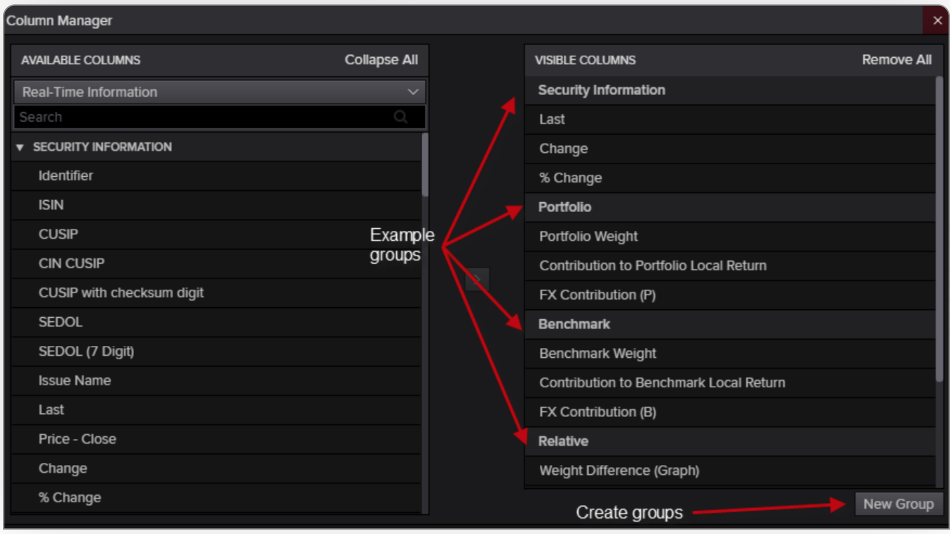


– Select your charts from the available list on the drop-down. The cog allows you to select the charts' individual settings. For intraday charts, this includes the option to backfill the chart to the start of the trading day

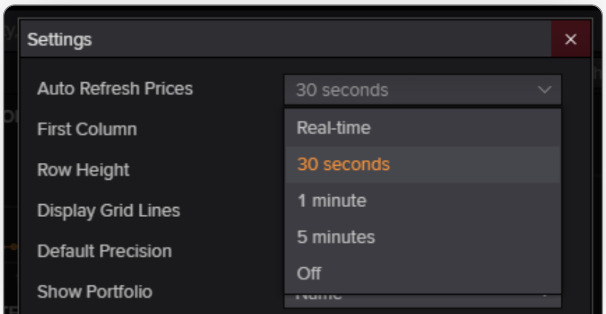


– Add data fields by accessing the column manager. Fields can then be selected from the left-hand drop-down lists. Visible columns will display on the right-hand side. Groups can be created, and data fields assigned to these, by dragging them into their respective groups

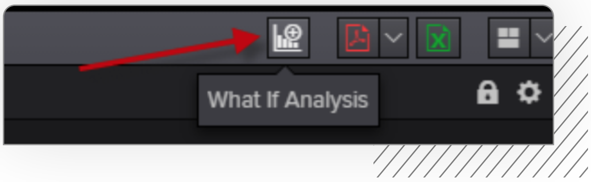




– The frequency of the auto-refresh on pricing updates can be selected from within the report settings

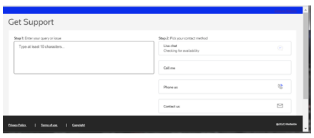


- The 'What If Analysis' analysis tool allows users to analyse the potential impact of investment decisions by creating simulated portfolios off the existing holdings, done by either editing the existing holdings or adding transactions. The tool effectively creates a one-day history portfolio, which can be retrieved in the What If section of PAL Manager. It is only valid for one day and if you want to keep the simulated portfolio you will need to re-save it as a proper funded portfolio



4. Need help?

- You can contact us directly through your access to Workspace for Wealth Advisors.
- Click on the question mark icon top right and submit your question via Get Support.



- Access our blended learning on the training site, [here]
- Visit [the Workspace for Wealth Advisors page]