

# For Wealth Advisors



W O R K S P A C E

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## Dashboard



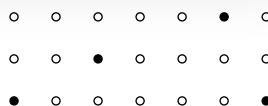
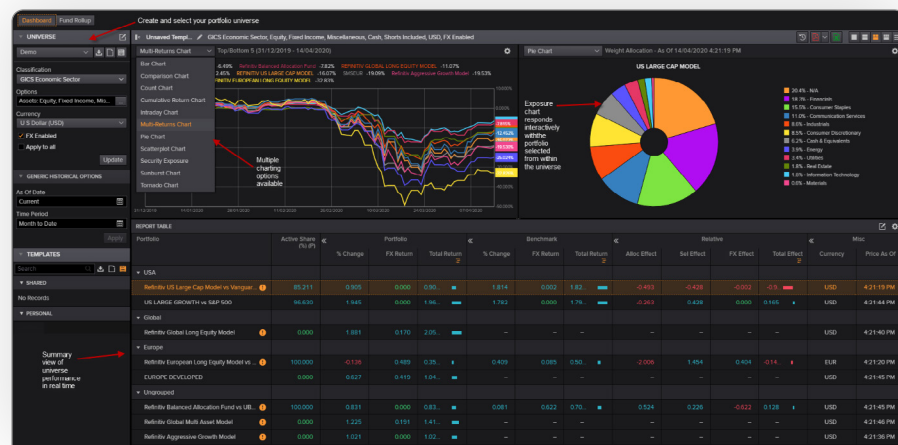


## 1. Why should I use the app?

Dashboard provides users the ability to monitor performance and exposure across their universe of portfolios in a single snapshot. Users can then drill down further into the summary data using the fund rollup, and can quickly check their exposure across the universe to specific securities using the new “Security Exposure” widget.

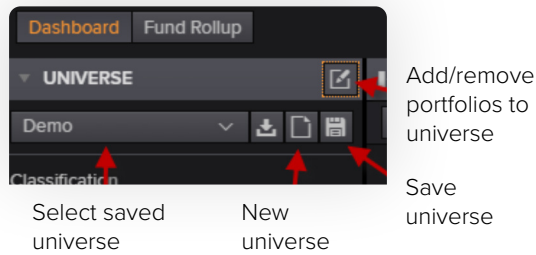
## 2. Key facts

- View multiple portfolio and benchmark combinations in a single snapshot view
- Group portfolios at multiple levels
- Monitor performance, attribution and exposures across the universe in real time.
- Create custom templates and reports. Share these with other users, export to PDF and Excel® or create batch reporting to automatically distribute
- Display multiple charting options to visualize portfolio performance and exposures across the universe
- The ‘Fund Rollup’ view provides a breakdown of exposures, risk and portfolio characteristics at the sector and security level, allowing users to drill down further into the data
- Users can quickly establish their exposure to a specific security across the entire universe using the new ‘Security Exposure’ widget

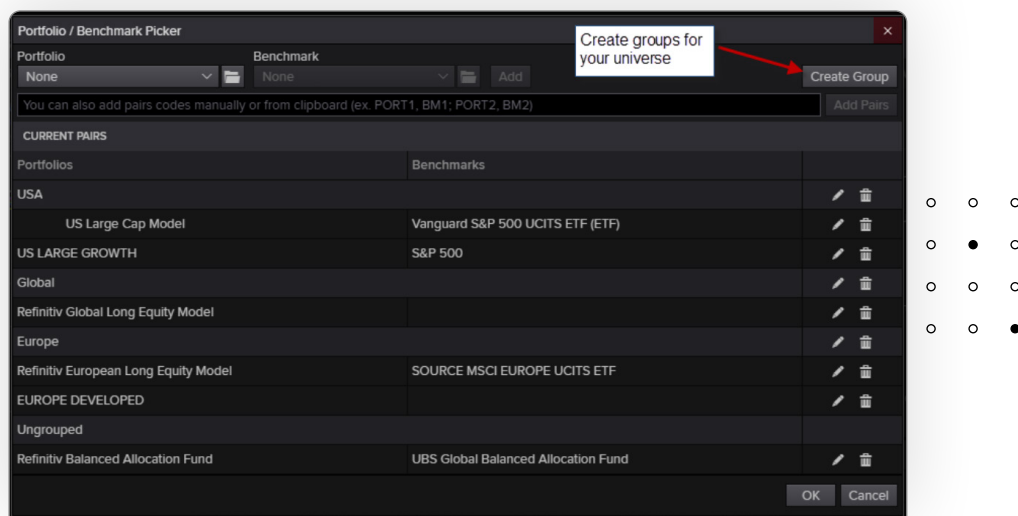


### 3. Top tips for using the app

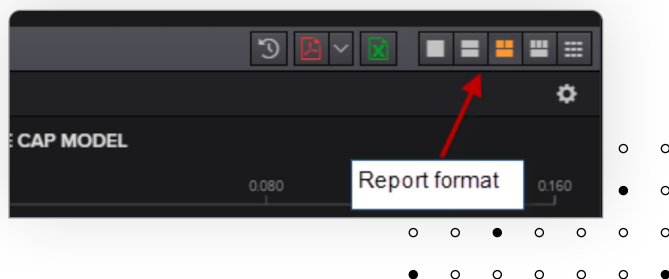
- To access, type **DASH** into the search toolbar and select **Portfolio Dashboard**
- Select your universe in the left-hand toolbar



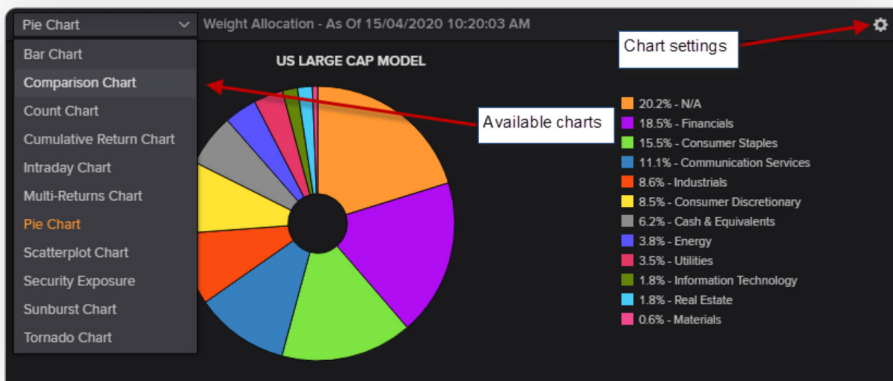
- When selecting portfolios and benchmarks to include in the universe, it is possible to create pairs and assign them to groups to be viewed on the dashboard



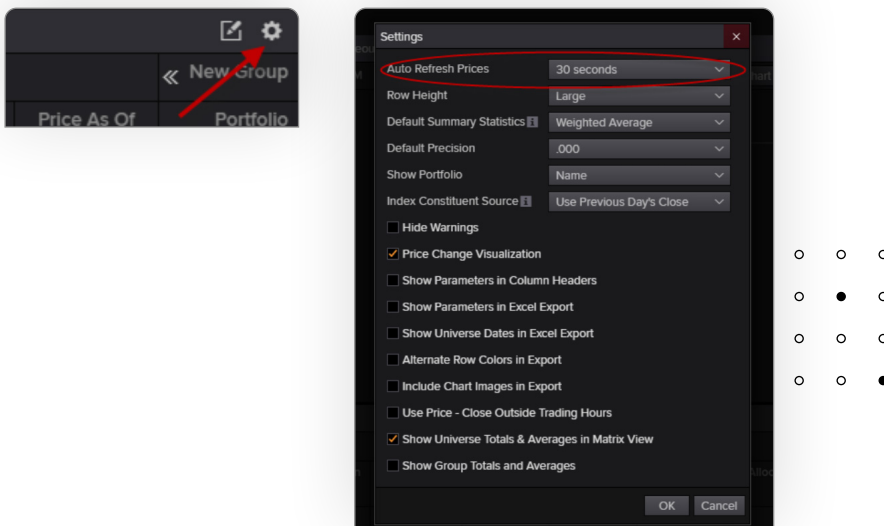
- Real-time data fields are available in the column picker under 'Real-Time Information.' Other data fields will be reflected based on the as of date
- The number of charts displayed can be selected using the report formatting options on the top right of the screen



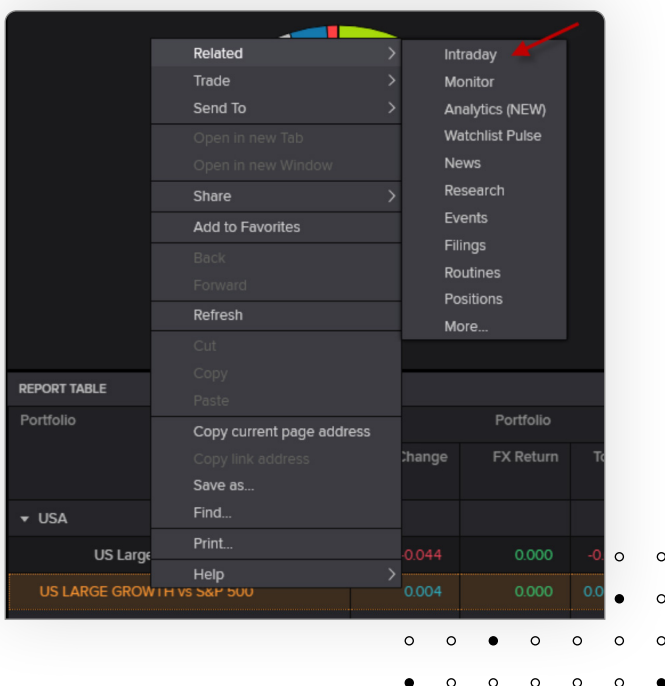
- Available charts can be viewed by selecting the dropdown. The chart settings are displayed by clicking on the cog



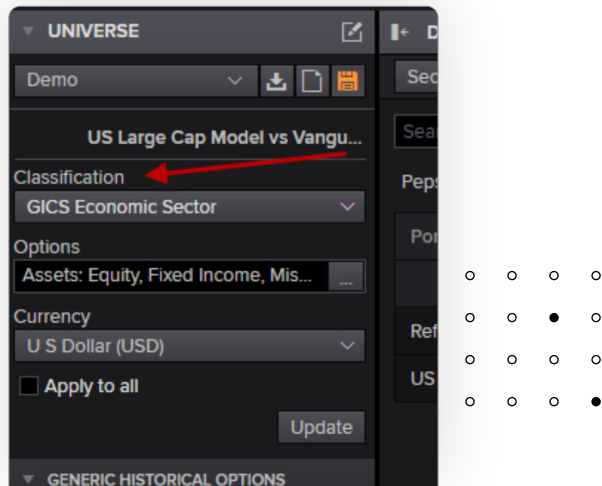
- In the settings menu, users can select the auto-refresh frequency of real-time pricing



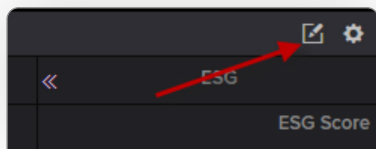
- For a detailed breakdown of the real-time data, users are able to directly send a portfolio through to the Intraday app in Portfolio Analytics by right clicking and selecting 'Intraday'



- The fund rollup function is available under the 'Fund Rollup' tab. This provides a breakdown of the summary screen down to the security level. Users can also add a sector breakdown in the universe options on the left-hand side



- Fields can be added to the report using the column picker



## 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](#)



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