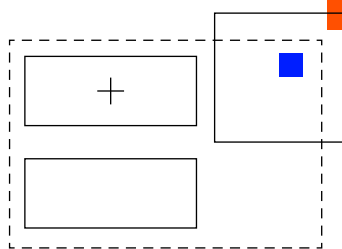


For Wealth Advisors

W O R K S P A C E

+1.2%



Portfolio Analytics

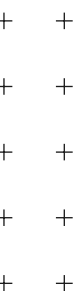
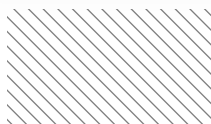
1. Why should I use the app?

The multi-asset Portfolio Analytics solution allows users to:

- Construct portfolios and monitor their positioning
- Evaluate portfolio performance and risk in absolute terms or versus a benchmark
- Create custom reports and templates

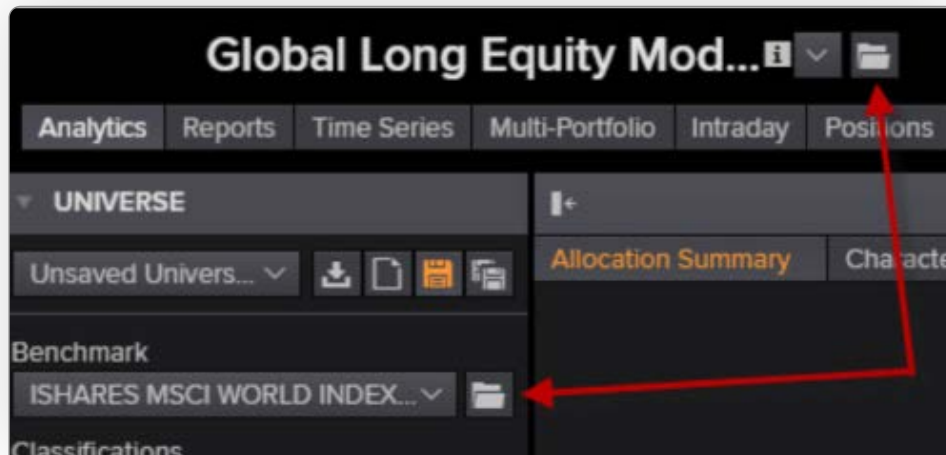
2. Key facts

- Create and load your own user-defined portfolios, including the ability to quickly create carve-outs and multifund composites
- Choose from a variety of market indices, managed funds and exchange-traded funds (ETFs)
- Multi-asset coverage: equity, fixed income, ETFs, mutual funds, currencies, listed futures and options
- Select from an expansive array of data fields, including proprietary data such as LSEG Fundamentals, LSEG Starmine and ESG analytics
- Industry-recognised performance attribution methodologies
- Features LSEG's Global Equity 2.0 Risk Model
- Set up batch reporting to automate distribution of the output
- 'What if' functionality supports investment decisions by allowing users to analyse the impact of potential portfolio changes

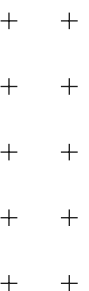
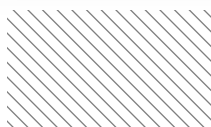


3. Top tips for using the app

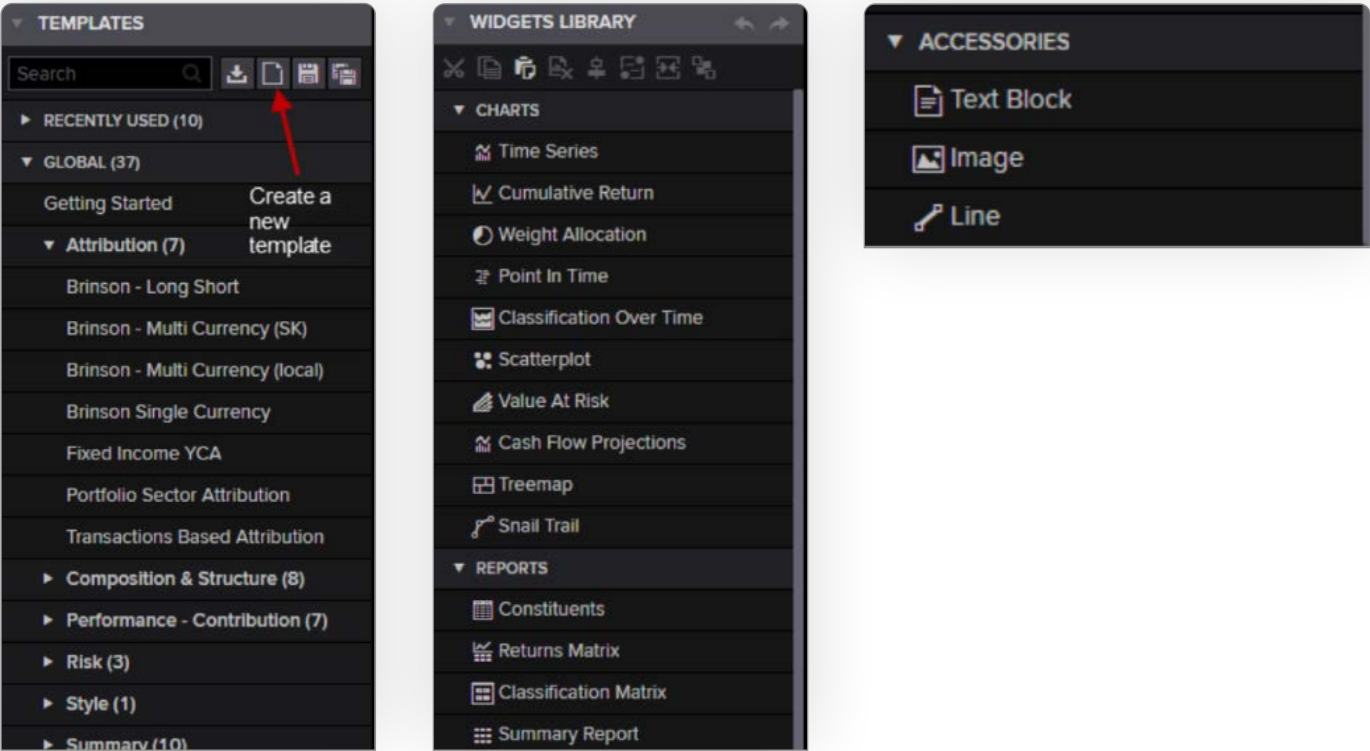
- To access, type **PORTF** into the search toolbar and select 'Portfolio Analytics'
- Select your portfolio and benchmark



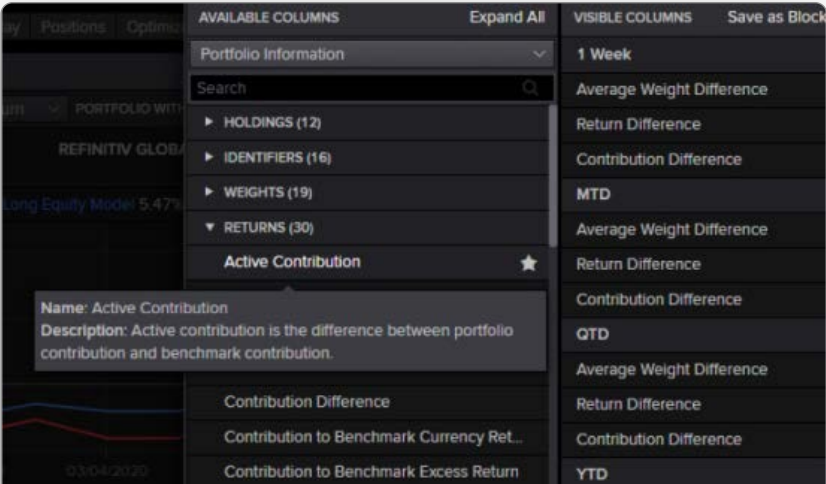
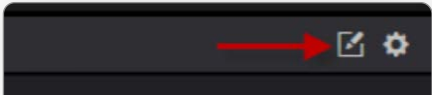
- Select your universe settings, such as time period and classification. The 'Option' setting includes additional options such as exclusion/inclusion settings. This can also be set individually for each widget for added flexibility. For portfolios holding funds, turning on the option to 'Expand Composite Assets' allows users to look through to the underlying holdings



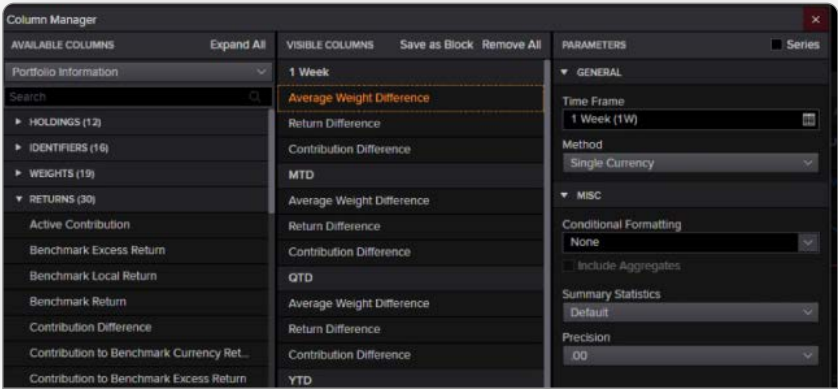
- Select a default 'Global' template or create your own custom templates using the available charting and reports widgets in the library, including the ability to add custom text or logos to reports



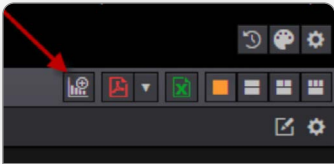
- Use the column manager to add data fields to charts and reports. The dropdown allows you to select from different categories of data field. Hovering over a field will provide a brief description. Once selected it is then possible to edit the field parameters, edit the field names and group fields together



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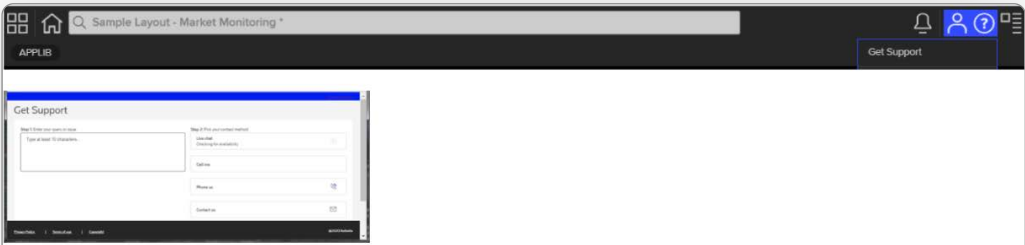


- The ‘What if’ analysis tool allows users to analyse the potential impact of investment decisions by creating simulated portfolios off the existing holdings, done by either editing the existing holdings or adding transactions. The tool effectively creates a one-day history portfolio, which can be retrieved 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 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](#)

