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**Portfolio Analysis**

Overview Performance Diversification Manage Web Portfolios & Watchlists

**Portfolio Analysis: Overview** Quote:  Go Lookup...

Do your portfolios match your financial goals? Quicken Investing's Portfolio Analysis tools can help you decide. Investigate your portfolios' performance, risk, exposure, and more.

### How is your portfolio really performing?

Plot the value of your portfolio over time and compare its performance to a benchmark and up to 10 individual holdings. Adjust for inflation to show how you are really doing in today's economy. Drill down to see historic performance, fundamentals, and more.

All Portfolios: 1 Month | 3 Month | 1 Year

Performance Analysis

### Are you balancing risk with return?

Learn how to optimize your portfolio by examining the relationship between asset allocation and the efficient frontier! Strive for maximum expected return in any given category of risk by aligning your allocations to better match a model portfolio.

All Portfolios: Risk Profile/Efficient Frontier

Risk vs. Return

### Are you participating in the full economy?

You've heard the saying "don't put all your eggs in one basket." Diversification across multiple sectors is key to hedging risk. See if you are protected from too much exposure to any one sector, and compare your allocations to an index.

All Portfolios: Sector Exposure

Sector Exposure

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Visit for details Quicken App is compatible with iPad, iPhone, iPod Touch, Android phones and tablets.

Just be aware of the limitations on accurate cost basis and reporting while the placeholder entries are present.. If there is any discrepancy between the holdings in your Quicken portfolio and the holdings recorded in your broker's online records, Quicken alerts you and gives you a chance to adjust your holdings.

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You may cancel before renewal date For full details, consult the Quicken Membership Agreement.. You can manage your subscription at your My Account page • Quicken 2019 for Windows imports data from Quicken for Windows 2010 or newer, Microsoft Money 2008 and 2009 (for Deluxe and higher).. Also, in case someone ever asks, SIT Mutual Funds cannot be downloaded to Quicken either.. I too have learned the the Intermediate excel exercises v lookup for mac T Rowe Price does not support Quicken 2017 for Mac for their mutual fund accounts--just the brokerage account.. Phone support, online features, and other services vary and are subject to change.

If there is a discrepancy found during the Compare to Portfolio process, Quicken displays the Adjust holdings amount dialog.. Online services require internet access Third-party terms and additional fees may apply.. Once you click Accept, the transactions list of your investment account will open.. T Rowe Price informed me that this was Quicken decision Additionally, I have found out that Prudential Retirement also does not support Quicken for Mac 2017.. Full payment is charged to your card immediately At the end of the membership period, membership will automatically renew every year and you will be charged the then-current price (prices subject to change).

15 payments per month included in Premier and above • Purchase entitles you to Quicken for 1 or 2 years (depending upon length of membership purchased), starting at purchase.. You need to resolve placeholder entries if you want to use these tools, but not if you want to track holdings-only information in Quicken.. • Monitoring alerts, data downloads, and feature updates are available through the end of your membership term.. You don't, however, need to resolve the placeholder entries immediately; you can do so at a later date.. Not all Quicken desktop features are available in the App The App is a companion app and will work only with Quicken 2015 and above desktop products.. Each placeholder entry identifies the security name and number of shares added to or subtracted from the account (for example, 50 shares of Intuit).. Notes If you need complete cost basis and accurate performance tracking, use the transaction list or the Holdings snapshot (Click the Account Actions icon), and then choose Account Overview to that were created as a result of Step 2. e10c415e6f