

Portfolio Performance Calculator

What is the Portfolio Performance Calculator?

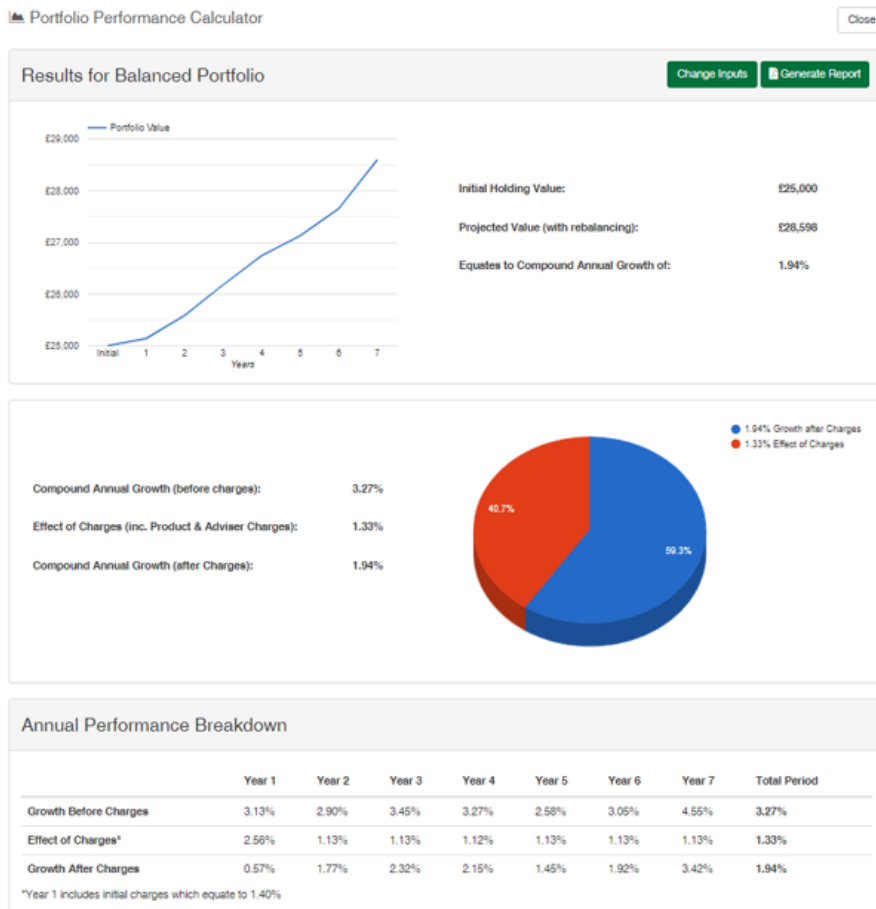
The Portfolio Performance Calculator allows you to clearly project the future performance of investment holdings, as well as being able to demonstrate the effect of growth and charges.

How to use the Portfolio Performance Calculator?

To use this calculator enter the Portfolio Name, Number of Holdings (between 2 and 50) and Number of Years Invested (1-10). We allow both £ or % holding and you can also select whether you intend to Rebalance the Portfolio.

Then all you need to enter is the details for each fund (Description, Holding, OCF/TER and Compound Annual Growth), confirm the Platform/Product Initial and Ongoing Charges and the Adviser Initial and Ongoing Charges.

The Portfolio added will then be saved, so you are able to amend or review this information over time.



How to review the Portfolio Performance Calculator Results?

When the results appear, you will see graphical illustrations of the performance of your portfolios for your chosen time period, using the information you have provided, along with confirmation of the key growth and charges figures.

We also provide a portfolio breakdown year on year underneath the results section of the screen.

You can also produce a client friendly report that contains all of the above information, as well as breakdown of each fund year on year.