Using Portfolio Analysis 3

Designed with usability in mind, Portfolio Analysis 3 makes it easier than ever to instantly start evaluating your portfolio. Your analysis is just a few clicks away – start typing in the Portfolio field to find your account and then choose your desired report. Portfolio Analysis 3 settings will already be preconfigured with your account, so you can immediately focus on gaining insights into your portfolio.

Click the Manage button to add a report to the left pane.

Use type-ahead functionality to find and select a portfolio.

Right-click on a column header to create your own custom chart based off any column in the table or click the Chart button to view FactSet-suggested charts.

Modify document-level settings (e.g., pricing sources, databases, date format) by clicking the Document Options button and selecting “Document Options” from the drop-down menu.

Modify report-level settings (e.g., report start and end date, columns, groupings) by clicking the Tile Options button within a tile and selecting “Options” from the drop-down menu. See Online Assistant page 17546 for more information about tile and document options.

Click the “Apply to” link to globally apply report settings (e.g., dates, groupings, and risk) to the other tiles in the document so tiles share a subset of common settings.

Click the Quick Links to edit specific report settings, such as groupings and report dates.

Click the Report Options menu to access report options such as edit, duplicate, rename, and remove. Edit allows you to add report tiles and edit the layout of your report view.

All reports in the left pane are included in your document. Each report can contain up to four report tiles.
Customizing a Multi-Tile Report Layout

Bring together multiple reports and charts into a single view and increase the depth of your analysis. The multi-tile reporting feature allows you to analyze up to four table and chart tiles in a single view. You can edit the report layout to arrange, add, edit, or remove report tiles to fit your reporting needs and streamline your workflow.

To get started, hover your mouse over a report in the left pane, click the Report Options button, and then select “Edit Layout.”

Drag and drop up to four tiles into your report. You can customize your layout by dragging tiles anywhere in your report view.

The tile library lists all chart and table tiles available in Portfolio Analysis 3. Insert any combination of charts and tables into your report view.

Click the Rename button to change the tile name.

Click the Delete button to remove a tile from your report view.

Click OK to return to document view.
Charting in Portfolio Analysis 3

FactSet offers extensive charting capabilities in Portfolio Analysis 3 to help enhance your analysis and improve the communication of your investment conclusions. Portfolio Analysis 3 offers several predefined charts, but also lets you manipulate charts to meet your needs.

Click the Table button to view the underlying data in a table format.

Right-click on a column header to create a custom chart based on that column's data.

Right-click on an area of the chart that you would like to edit and select “Format.” The options you see in the formatting panel will differ depending on where you clicked in the tile.

TIP > While the formatting panel is open, right-click on other chart areas to continue formatting.

Click the Advanced button to define additional formatting options.

Hover over charted data to view corresponding detailed information.