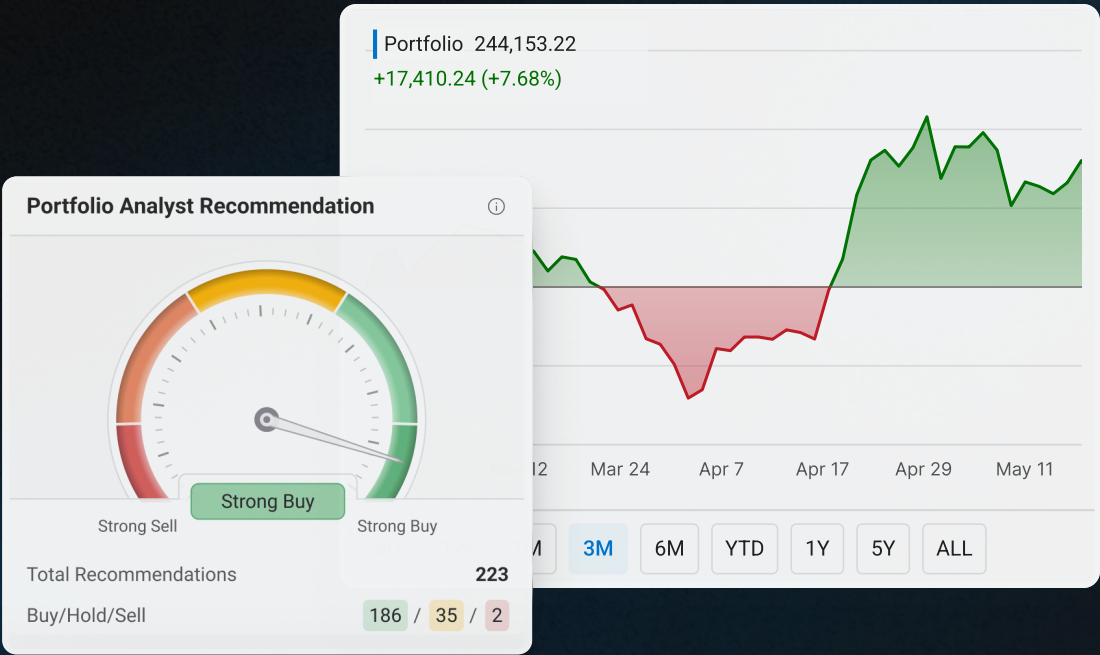


PORTFOLIO ANALYSIS

Make Portfolio Performance Easier to Understand



Show the Bigger Portfolio Picture, Beyond Holdings

Most platforms show users what they own, but not enough about how those holdings connect to portfolio performance. Without a clearer context, users are left to interpret balances, positions, allocations, and activity on their own.

Features

-  Portfolio Holdings Review
-  Portfolio Performance Visibility
-  Allocation and Positioning Insights
-  Portfolio Activity Review
-  Interactive Web Content Experience
-  User-Friendly Portfolio Analysis Tools

Add Clarity to Portfolio Performance

Portfolio Analysis gives users a more complete way to understand portfolio performance by connecting holdings, allocation, and activity into a single, clearer digital experience. Instead of forcing users to manually piece together portfolio movements, platforms can provide tools that help them understand how different parts of their portfolios fit together.

Turn Portfolio Data into a Better User Experience

A portfolio experience shouldn't stop at balances and positions. Portfolio Analysis helps platforms add more context around performance, making portfolio data easier to review, understand, and revisit over time.

Who’s it for?

Active Investors Review holdings, monitor performance, and better understand portfolio movement.	Independent Investors See how investments are positioned and how portfolio activity connects to performance.	Portfolio Managers Review portfolio activity, holdings, and positioning within a structured digital experience.
Brokerage Platforms Deliver portfolio analysis tools that help users better understand portfolio performance.	Wealth Management Platforms Help review portfolio positioning, performance, and investment activity with greater clarity.	Financial Portals Add useful portfolio analysis tools that support investor education and engagement.

Core Product Components

 Portfolio Holdings Review Give users a clear way to view the positions contributing to their portfolio.	 Performance Visibility Help monitor portfolio performance and understand how investments change over time.	 Allocation Insights Support portfolio review by showing how investments are distributed across holdings.
 Portfolio Activity Review Make it easier for users to evaluate portfolio movement, changes, and investment activity.	 Interactive Web Experiences Deliver analysis through a web content experience that fits digital investing workflows.	 Investor Engagement Layer Give users a stronger reason to return, review, and understand their portfolio more often.



Contact QuoteMedia

If you want to explore more about what QuoteMedia's Portfolio Analysis can do for you and your team, feel free to reach out to us today to learn more!

Call Toll Free: 1-844-485-8200
Outside North America: 1-250-586-9943
✉ sales@quotemedia.com
🌐 quotemedia.com