Investing

Quicken combines data from all your investment accounts, no matter how many different financial institutions and plan administrators you have. Simply create a Quicken account for each of your real-world investment accounts, and then use the powerful research and analysis tools to examine all your investments in one place. The Investing tab, Portfolio, Portfolio Analyzer, Security List, and investment reports provide news, fundamentals, performance, history, and analysis. Perhaps just as importantly, you can create a personalized asset allocation target that includes all your accounts together, and then monitor and rebalance as necessary. The Portfolio X-Ray feature analyzes deep into mutual funds, ETF's, and other equity funds to reveal your true exposure in individual equities, including those in your mutual funds.

Keeping your records up to date is simple using the Enter Transaction dialogs. Better still, sign up for online account services with Quicken and simply update transactions, balances, and holdings directly from your participating financial institution (Internet access required).

You can also evaluate your holdings, research potential investments, download stock quotes, and historical prices. You can have Quicken alert you about important news about the securities in your portfolio or **Watch List** (Internet access required).

Quicken records the purchase dates and prices when you enter or download transactions, so you don't need to search for old brokerage statements to identify lots and calculate tax liability when you sell. Just tell Quicken how you want to handle the sale—First Shares In, Last Shares In, Minimum Gain, or Maximum Gain. The Capital Gains Estimator can help you optimize security sales to realize the greatest after-tax yield. And the capital gains report can save you hours at tax time.

Topics

        - How do I resolve placeholder entries?
    - About using Quicken.com to view and work with my accounts
        - Update account information on Quicken.com
        - How do I copy a Quicken investment portfolio to a Quicken.com investment portfolio?
    - About restricted stock units
    - Convert Shares Added to Stock Split
- Investing Help
    - Why aren't individual investments projected?
    - Security Setup & Asset Class Mixture
    - Move Shares Out
    - No valid prices found to import
    - Create Opening Share Balance
    - Cash/Share Balance Reconciled
    - Investment account: balance adjustment
    - No reconciliation for mutual fund accounts with splits
    - Transaction Fees
    - Current Value
    - Off by % points
    - Target %
    - What rate of return am I currently getting?
    - How do I resolve renamed securities?
    - Asset class
    - Different transaction histories
    - When should I rebalance?
    - Adjustment
    - What are the rules for tax-deferred distributions?
    - Account setup brokerage holdings summary
    - How do I track employee stock purchase plan (ESPP) shares manually (for accounts from previous Quicken versions)?
    - Additional 401(k) Information
    - Marketplace/Financial Institution News tab banking and investments
    - What is the ending cash balance for this account?
    - What is the financial institution for this account?
    - Your brokerage may use a money market fund to represent the cash balance in this account
    - What securities are in this account?
    - How do I use a linked checking account?
- Investing Task
    - Add Security to Quicken
    - How do I add shares to an account without affecting an account's cash balance?
    - How much detail do you want to include in this adjustment?
    - How do I archive investment transactions?
    - How do I calculate whether to cash a U.S. Savings Bond in early?
    - How do I convert a brokerage account to a 401(k) or IRA account?
    - Edit Security Details
    - How do I find cash? (Capital Gains Estimator)
    - How bonds are priced
    - Tell me how Quicken records the numbers I enter (Price or Shares)
    - Accept downloaded transactions into transaction list
    - Match Securities
    - How do I move investment transactions?
    - What if Quicken asks me how I want to record a Downloaded Shares/Downloaded Shares Removed transaction?
    - How do I select accounts to use? (Capital Gains Estimator)
    - How do I set up a target asset allocation?
    - How do I specify lots when selling a security?
    - How do I specify shares to sell and price? (Capital Gains Estimator)
    - About state tax rates (Capital Gains Estimator)
    - Why is Quicken telling me to launch a wizard?
    - How do I work with investment transaction groups?
    - Enter a single mutual fund's opening share balance
    - Entering a share price
    - Enter your current holdings information
    - Entering the numbers of shares
    - How do I work with memorized investment transactions?
- Investing Troubleshooting
    - How do I resolve a security comparison mismatch
    - What if I need to fix a downloaded Sell transaction that doesn't have a corresponding Buy?
    - What if something goes wrong (Updating investment account statements)
    - What if something goes wrong (Entering investment transactions)
    - What if I need to move shares in or add shares to my investment account without executing a Buy transaction?
    - What if I need to get the current price of my stock option update when I download quotes?
    - What if I need to remove shares from my investment account without executing a Sell?
    - What if I need to resolve a difference between my Quicken portfolio and the downloaded holdings from my broker?
    - What if something goes wrong with investments?
    - What if Quicken asks me how to add a new cash transaction that I just downloaded into my brokerage account? (What are my options?)
    - What if I delete a security? Will its price history still be stored on my computer?
    - What if I need to fix a negative ending cash balance?
    - What if Quicken was unable to get prices for some of the securities I track?
    - What if something goes wrong (Reconciling investment accounts)
    - "The transaction about to be reversed is not in your transaction list" when comparing and accepting downloaded transactions
    - What if something goes wrong (Tracking securities and security prices)

Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"