About monitoring portfolio performance

One of the primary advantages of creating a Quicken account for each of your real-world investment accounts is that you can see the overall effect of your investment decisions. The Quicken Portfolio lists every security in your Quicken investment accounts. The Portfolio and other views in the Investing tab give you the broader perspective. You can compare performance indicators and fundamentals data for your holdings, your Watch List, and several market indexes. You can further refine your analysis by customizing the information being displayed.

Note that Quicken relies on accurate and complete data to derive reliable performance measures. To view certain performance measures, it may be necessary first to replace placeholder entries with complete historical data.

Entering updates to a 401(k)/403(b) account

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- Tell me about key investment performance calculations used in Quicken
- How do I view performance and analysis information for an investing account?
- How do I customize the Portfolio?
- How do I view the tax implications of my holdings?
- How do I use standard Portfolio page to answer investment questions
- How do I see the value of my portfolio?
- How do I view my Average Annual Return (IRR)?
- How do I compare the performance of my portfolio to industry benchmarks?
- How do I view ROI in the Portfolio window?
- Analyze my portfolio
- How do I create investment reports?
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- How do I export my portfolio to Excel?