

Asset class

These are the asset classes Quicken uses.

Asset Class	Description
Large Cap Stocks	Stocks of U.S. companies that have a market capitalization of \$4.0 billion or more.
Small Cap Stocks	Stocks of U.S. companies that have a market capitalization of under \$4.0 billion.
International Stocks	Publicly traded stocks of companies based in countries other than the U.S.
Domestic Bonds	Government or corporate bonds issued in the U.S.
Cash & Money Market	Stable, short-term investments that provide income that rises and falls with short-term interest rates.
Other	Investments that cannot be classified as any of the above.

Add a custom asset class

In addition to Quicken's defined asset classes, you can add up to ten custom asset classes.

1. Open your **Security List (CTRL+Y)**.
2. Select the stock you want to assign a custom security type to.
3. Select **Edit**.
4. Under **Asset Class**, select **Customize**.

Edit Security Details

Name:

Symbol: [Look Up...](#)

Type: [Edit Types...](#)

Asset class

☒ Single [Customize](#)

☐ Mixture [Define...](#)

☒ Download asset class information
(This will replace your current asset class information.)

☐ Tax free

☐ Matched with online security [Other Info](#)

[?](#) [OK](#) [Cancel](#)

5. Rename any of the custom categories listed.

6. Select **Customize**.

Asset class

☒ **Single** Unclassified ▼ **Customize...**

☐ **Mixture** Define...

☐ **Download asset class information**

(This will replace your current asset class information.)

That asset will now be assigned to the custom **Asset Class**,

and future Assets can also be assigned to that **Asset Class**.



Quicken's pre-defined asset classes cannot be edited.