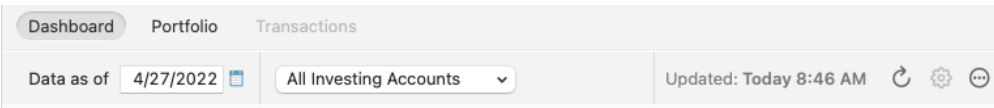
# Investing - Mac

## About the Investing Dashboard

The Investing Dashboard provides you with information about your investments, including Holdings, Top 10 Movers, Asset Allocation, and Allocation by Security. This information is provided using cards that can be moved and adjusted.

Additionally,  at the top of the Dashboard is a toolbar that lets you set a Date, Select from your accounts, and update the values of your holdings. It also displays the date and time of your last update.

## Toolbar




The toolbar gives you control of your investment experiences. You can:

- Use **Date as of** to see what your holdings looked like on a particular date.
- Use the account selection to choose between **All Investing Accounts** and other options such as individual accounts or just retirement accounts.
- Review the **Updated** date and time to see when your holdings were most recently updated in Quicken.
- Update your holdings using .

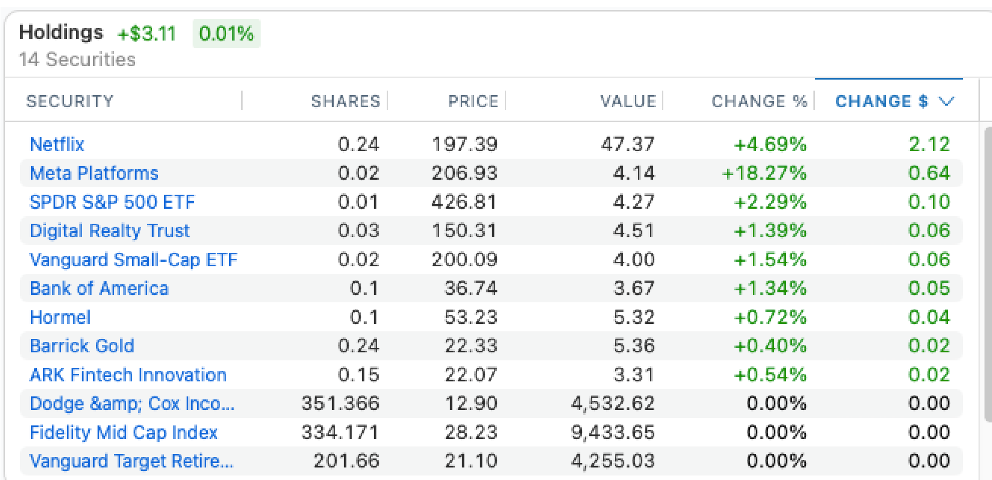
## About your investing cards

The Investing Dashboard uses four cards to provide information about your securities.

### Holdings card

The **Holdings** card lists all of your holdings and can be sorted by any column by clicking on the column header.

At the top of the card, you can view the total change for that day based on both the dollar amount and the percentage.



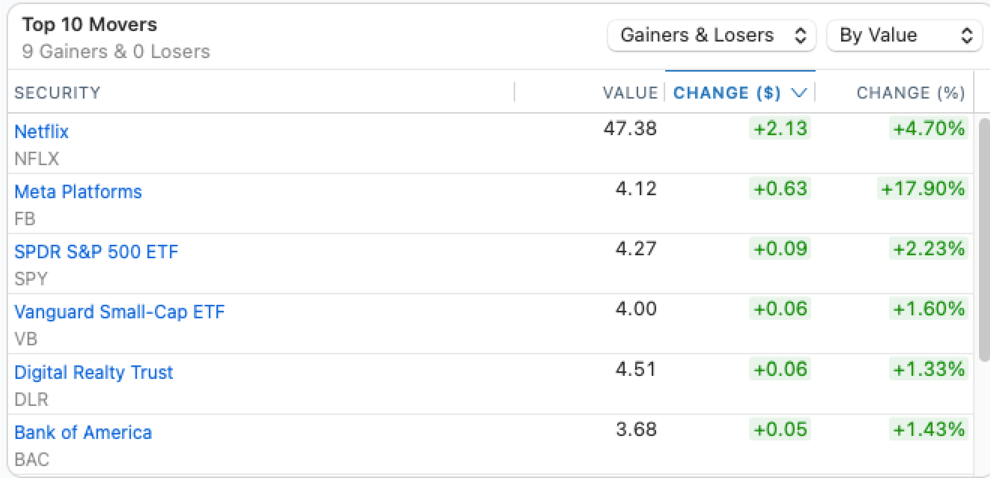
Holdings +$3.11 0.01%
14 Securities

| SECURITY | SHARES | PRICE | VALUE | CHANGE % | CHANGE $ |
|---|---|---|---|---|---|
| Netflix | 0.24 | 197.39 | 47.37 | +4.69% | 2.12 |
| Meta Platforms | 0.02 | 206.93 | 4.14 | +18.27% | 0.64 |
| SPDR S&P 500 ETF | 0.01 | 426.81 | 4.27 | +2.29% | 0.10 |
| Digital Realty Trust | 0.03 | 150.31 | 4.51 | +1.39% | 0.06 |
| Vanguard Small-Cap ETF | 0.02 | 200.09 | 4.00 | +1.54% | 0.06 |
| Bank of America | 0.1 | 36.74 | 3.67 | +1.34% | 0.05 |
| Hormel | 0.1 | 53.23 | 5.32 | +0.72% | 0.04 |
| Barrick Gold | 0.24 | 22.33 | 5.36 | +0.40% | 0.02 |
| ARK Fintech Innovation | 0.15 | 22.07 | 3.31 | +0.54% | 0.02 |
| Dodge & Cox Inco... | 351.366 | 12.90 | 4,532.62 | 0.00% | 0.00 |
| Fidelity Mid Cap Index | 334.171 | 28.23 | 9,433.65 | 0.00% | 0.00 |
| Vanguard Target Retire... | 201.66 | 21.10 | 4,255.03 | 0.00% | 0.00 |

### Top 10 Movers card

The **Top 10 Movers** card lists the stocks that have had the greatest change in value that day. It can be sorted by Value, Change in dollar amount, and Change in percentage. The stocks with gains will always be listed above the stocks with losses.

At the top of the card, you can see the total number of gainers and losers for that day.



**Top 10 Movers**
9 Gainers & 0 Losers

Gainers & Losers | By Value

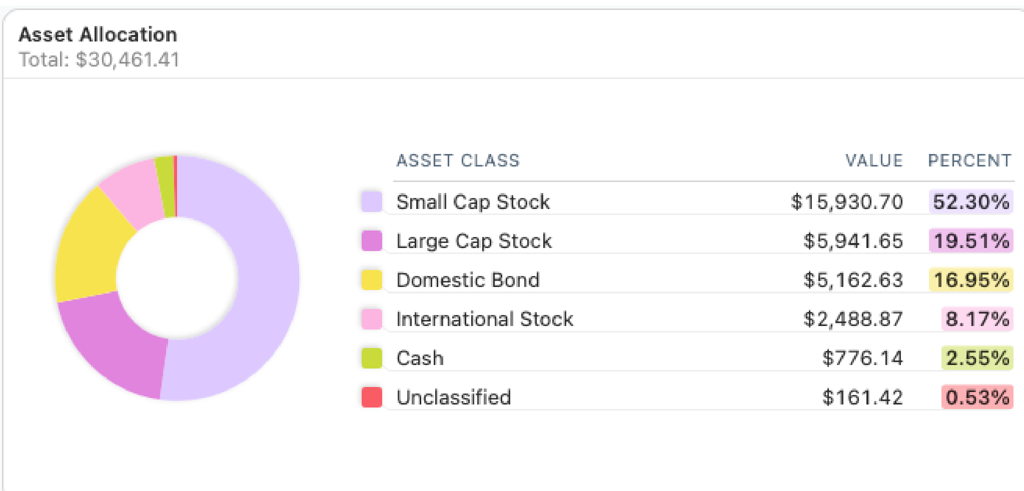
| SECURITY | VALUE | CHANGE ($) | CHANGE (%) |
|---|---|---|---|
| Netflix<br>NFLX | 47.38 | +2.13 | +4.70% |
| Meta Platforms<br>FB | 4.12 | +0.63 | +17.90% |
| SPDR S&P 500 ETF<br>SPY | 4.27 | +0.09 | +2.23% |
| Vanguard Small-Cap ETF<br>VB | 4.00 | +0.06 | +1.60% |
| Digital Realty Trust<br>DLR | 4.51 | +0.06 | +1.33% |
| Bank of America<br>BAC | 3.68 | +0.05 | +1.43% |

## Asset Allocation card

The **Asset Allocation** card presents a graph of how your holdings are allocated by investment class, such as Small Cap Stock, Large Cap Stock, Domestic Bond, International Stock, Cash, etc.

The total amount of your assets is listed at the top of the card.

You can hover over an item in the graph or legend to highlight it and get more information. To see even more details, such as a graph with the holdings in an investment class, click on the class either in the graph or the legend. This also works if there is an **Other** slice and you want to see a graph of the **Other** items.



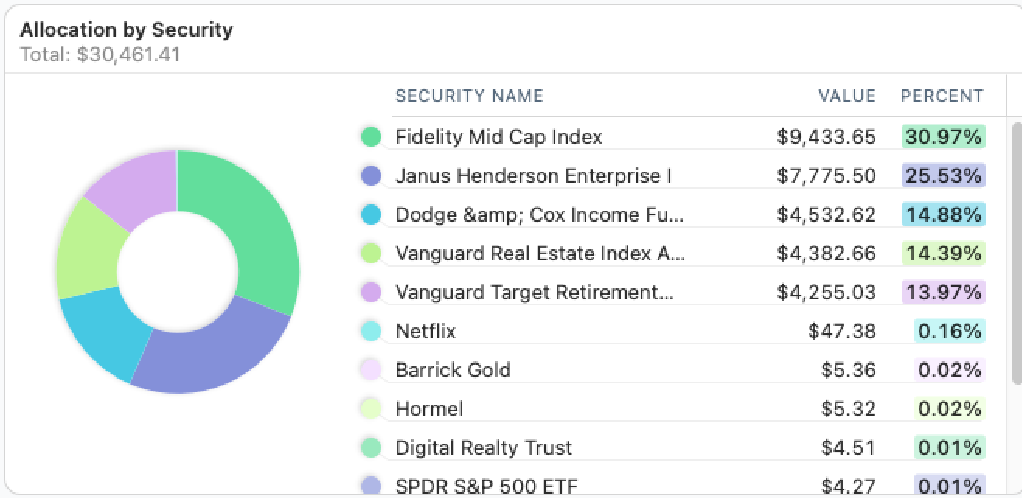
**Asset Allocation**
Total: $30,461.41

| ASSET CLASS | VALUE | PERCENT |
|---|---|---|
| Small Cap Stock | $15,930.70 | 52.30% |
| Large Cap Stock | $5,941.65 | 19.51% |
| Domestic Bond | $5,162.63 | 16.95% |
| International Stock | $2,488.87 | 8.17% |
| Cash | $776.14 | 2.55% |
| Unclassified | $161.42 | 0.53% |

## Allocation by Security card

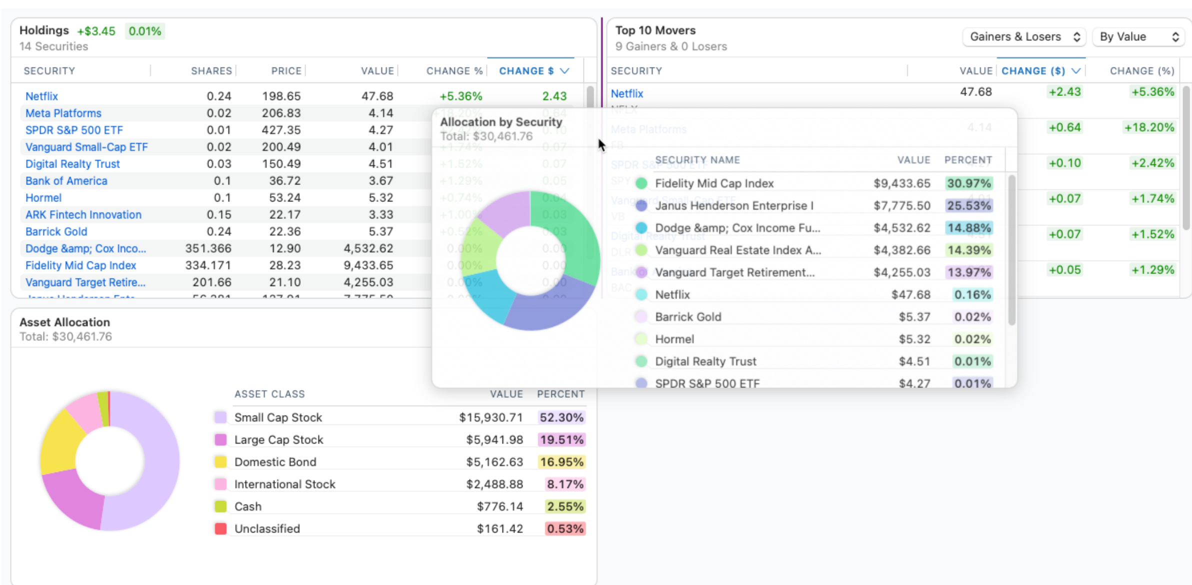
The **Allocation by Security** card shows a graph of your holdings listed by security. The legend will display the securities from the largest to the smallest.

You can hover over an item in the graph or legend to highlight it and get more information. If that security contains other listed securities, you can click to see those securities. This also works if there is an **Other** slice and you want to see a graph of the **Other** items.




## Moving your cards

You can move and arrange your cards using drag and drop. Click and hold on the top part of the card and drag the card to where you want it to be. If you drag it directly on top of another card, the two cards will switch places. If you drag a card before or after a different card, the other cards will reorder to make room for the card in that position.




## More investment topics

- About Simple Tracking
- Adding a short sell
- Adding a stock split
- Adding dividend income
- Adding expenses
- Adding income
- Adding interest income
- Adding long-term capital gain
- Adding miscellaneous expenses
- Adding miscellaneous income
- Adding Payment/Deposit
- Adding reinvestments
- Adding return of capital
- Adding shares
- Adding short-term capital gain
- Adding stock dividend
- Adding transactions to resolve out-of-balance securities
- Buying bonds

- Buying securities
- Buying to cover
- Creating securities
- Deleting securities
- Importing securities
- Investing portfolio tab
- Learning about investing in Quicken
- Learning about the transactions view
- Merging securities
- Paying margin interest
- Portfolio time machine (as of date)
- Reinvesting long-term capital gain
- Reinvesting short-term capital gain
- Removing Shares
- Resolving missing cost basis (placeholders)
- Selling securities
- Setting up investment accounts
- To record a dividend reinvestment
- To record an interest reinvestment
- Updating share prices
- Viewing security quotes and market value graphs
- Viewing your holdings