



My Portfolio Page Tour

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Portfolio: My Portfolio (default)

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50 Portfolios Unlimited Tickers

Details	Ticker	Name	Type	Sector / Category	Price ¹	Mkt Val / AUM ²	Overall Rating	Report	ROIC	FCF Yield	Price to EBV	GAP	Analyst Notes ³	Remove
+	ORCL	Oracle Corporation	Stock	Information Technology	\$38.87	\$159,583	Very Attractive	↓	24%	7%	1.0	< 1		×
+	IVV	iShares Trust: iShares Core S&P 500 ETF	ETF	Large Cap Blend	\$217.10	\$79,587	Very Attractive	↓	17%	2%	2.6	31		×
+	JNJ	Johnson & Johnson	Stock	Health Care	\$118.75	\$324,885	Attractive	↓	14%	5%	1.3	8		×
+	VNQ	Vanguard Specialized Funds: Vanguard REIT Index Fund; ETF Shares	ETF	Financials / REIT	\$82.29	\$34,921	Neutral	↓	6%	2%	3.9	25		×
+	CELG	Celgene Corporation	Stock	Health Care	\$104.03	\$80,635	Dangerous	↓	16%	-8%	5.9	34		×
+	AMT	American Tower Corp	Stock	Telecom Services	\$108.51	\$46,170	Very Dangerous	↓	5%	-4%	20.0	80	New Forecast 10/4/16 Most Dangerous Oct 2016	×
+	DDVAX	Delaware Group Equity Funds II: Delaware Value Fund	Mutual Fund	Large Cap Value	\$19.18	\$13,310	Very Dangerous	↓	7%	3%	3.4	33		×

- 1 The My Portfolio page is your dashboard for tracking stocks, ETFs, and mutual funds. Click the drop-down menu to select one of your custom-built portfolios or one of New Constructs' model portfolios like our Most Attractive Large Cap stocks.

2 Type or paste tickers here and click "Add" to add holdings to your portfolio. You can add multiple tickers at once separated by spaces, commas, or semicolons.

3 Click the "+" icon to expand the rating details section for more information on any ticker in your portfolio

4 Identifying information for each holding is shown here. Sort your portfolio by any column by clicking the header.

5 Track the ratings of your holdings. See our rating methodologies.

6 Download our report for any holdings in your portfolio by clicking the down arrow icon.

7 Review key metrics for your holdings.

8 Analyst Notes provide additional insight.

9 Remove any holding from your portfolio by clicking the X icon. Removing a holding does not count as a change.
- 10 Your Membership badge shows how many portfolios you can create and how many holdings you can track.

11 The Edit/Create badge allows you to create new portfolios, rename existing portfolios, and set your default portfolio.

12 Sign up for daily and weekly email updates on important changes to our models for you holdings – including rating changes.

13 Download a CSV of your portfolio that you can view in Excel.

14 Print a copy of your portfolio to share offline.

15 Find new ideas with our Stock and ETF & Mutual Fund Screeners.

16 See the Research section for more buy/sell ideas, model portfolios, and more.

17 Learn about forensic accounting and valuation methodologies from our experts in our Education Center.

18 Contact us if you have any questions.

19 Click here to take the tour anytime. Thank you!

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