

My Portfolio Page Tour

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50 Portfolios Unlimited Tickers

| 3 Details | 4 Ticker | Name | Type | Sector / Category | Price ¹ | Mkt Val / AUM ² | Div Yield | Risk/Reward Rating 5 | 6 Report | 7 ROIC | FCF Yield | Price to EBV | GAP | 8 Analyst Notes Updated ³ | 9 Remove |
|------------------------|-----------------------|--|-------------|------------------------|--------------------|----------------------------|-----------|-----------------------------------|-----------------------|---------------------|-----------|--------------|-------|---|-----------------------|
| + | RE | Everest Re Group, Ltd. | Stock | Financials | \$259.53 | \$10,659 | 1.9% | Very Attractive | ↓ | 13% | 4% | 0.4 | < 1 | | ✘ |
| + | FDIGX | Fidelity Select Portfolios: Fidelity Advisor Consumer Staples Fund | Mutual Fund | Consumer Staples | \$100.78 | \$2,848 | - | Very Attractive | ↓ | 13% | 1% | 1.6 | 20 | Jul 14, 2017 | ✘ |
| + | IVV | iShares Trust: iShares Core S&P 500 ETF | ETF | Large Cap Blend | \$248.91 | \$115,463 | - | Attractive | ↓ | 18% | 2% | 2.3 | 20 | Jul 13, 2017 | ✘ |
| + | VNQ | Vanguard Specialized Funds: Vanguard REIT Index Fund; ETF Shares | ETF | Financials / REIT | \$84.38 | \$33,988 | - | Neutral | ↓ | 6% | 1% | 2.6 | 11 | | ✘ |
| + | TWTR | Twitter, Inc. | Stock | Information Technology | \$16.84 | \$12,307 | - | Unattractive | ↓ | -3% | -4% | -2.2 | > 100 | | ✘ |
| + | CFX | Colfax Corporation | Stock | Industrials | \$40.83 | \$5,022 | - | Very Unattractive | ↓ | 4% | 5% | 3.2 | > 100 | | ✘ |
| + | KPSCX | KP Funds: KP Small Cap Equity Fund | Mutual Fund | Small Cap Blend | \$12.07 | \$966 | - | Very Unattractive | ↓ | 6% | -1% | 3.9 | 34 | | ✘ |

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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