

FT Portfolio

Monitor your stock's performance directly on FT.com

Accessing the FT Portfolio tool

The FT Portfolio tool allows you to track the performances of your holdings, view new stories and key fundamentals related to your portfolio holdings:

- From the FT home page: “Portfolio” link on the grey bar
- From the “Markets” section: hover over “Markets Data” and choose “Portfolio” from the drop-down menu
- From the “Tools” drop-down menu: hover over “Tools” and choose “Portfolio”
- Go directly to portfolio.ft.com

You will be brought to the FT Portfolio dashboard.

The screenshot shows the FT Portfolio dashboard. At the top, there is a navigation bar with links for Home, UK, World, Companies, Markets, Global Economy, Lex, and Comment. Below this is a secondary navigation bar with links for fastFT, Alphaville, FTfm, Markets Data, Trading Room, Equities, Currencies, and Capital Mkts. The main content area is titled "Portfolio" and includes a "Dashboard" section with a star icon and buttons for "New portfolio" and "New watchlist". There are three main sections: "Your portfolios" with a sub-header "Unrealised Total return" and a message "Track the performance of your investments with the FT.com portfolio tool. Create a portfolio"; "Your watchlists" with a sub-header "Gainers Losers" and a message "Watchlists are a great tool for identifying and tracking potential investments. Get started"; and "Today's movers" with a sub-header "Gainers Losers" and a message "There are no gainers in your portfolios or watchlists today." Each section is updated "Last refreshed 11 minutes ago".

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Creating a portfolio

Click on the “New portfolio” blue button . A window will appear (see image) where you are asked for some information:

- Name your portfolio (e.g. “My holdings”)
- Choose a currency (which can be changed afterwards)
- Choose how you want your dividends to be managed: manually; reinvested; moved to a cash holding; included in return but not value; or not include them in the portfolio
- Choose whether you wish to be notified about your dividends

CREATE A NEW PORTFOLIO

Portfolio name

Currency

Dividends **Manage manually** ▼
Best for investors who'd prefer to take an active role in the management of their dividends.

Notify me when I receive dividends.

Click on “Save and continue”. You will always have a confirmation box suggesting you to add transactions to that portfolio.

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Adding holdings to your portfolio (1/2)

There are two ways of adding holdings to your portfolio. The first one is from the Portfolio tool:

- Go in the chosen portfolio (e.g. “My holdings”)
- Click on “Add transaction” button: a window will open (see image)
- Type in the symbol of the company in its primary listing (for example: PSON:LSE for Pearson)
- Choose the type of transaction (buying or selling)
- Specify the quantity (e.g. 100)
- You can modify the price or use the current price (note that the price is displayed in pence, not pounds)
- Click on “Add transaction” to complete (you will then see a confirmation screen)

You can also backdate the transaction if you want your portfolio to properly reflect your holdings.

ADD TRANSACTION ✕

Portfolio **My holdings**

Date

Asset type Security Cash Other

Name or symbol

Transaction Buy Sell

Position Long Short

Quantity

Price (GBP) Last price as of 15 Jan 2015 12:58 GMT. Data delayed at least 15 minutes.
Use last price from 15/01/2015

Fees (optional)

Add transaction Cancel

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Adding holdings to your portfolio (2/2)

The second way of adding transaction is from a company's equities page on FT.com:

- Find the company's equities page from the search function on FT.com (for example type in "Pearson" and choose the primary listing or type PSON:LSE directly)
- When you are on the company's equities page, click on "Add to portfolio" above the company's name: a window will open (see image below)
- Choose the portfolio you want to add the transaction in (e.g. "My Holdings"), the type of transaction, the quantity, the price (still in pence) and select a date
- Click on "Add to portfolio" to complete

You will again see a confirmation box of the new operation.



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Adding funds to your portfolio

- Go in the chosen portfolio (e.g. “My holdings”)
- Click on “Add transaction” button: a window will open (see image)
- Type in the name of the fund or its ISIN number (it is easier with the latter)
- Choose the type of transaction (buying or selling)
- Specify the quantity (e.g. 100)
- You can modify the price or use the current price (note that the price is displayed in pences, not pounds)
- Click on “Add transaction” to complete (you will then see a confirmation screen)

You can look for the fund's ISIN in the FT Funds Directory: <http://funds.ft.com/uk/funds-directory/>

ADD TRANSACTION ✕

Portfolio **My holdings**

Date

Asset type Security Cash Other

Name or symbol

Transaction Buy Sell

Quantity

NAV Last price as of 14 Jan 2015. Data delayed at least 15 minutes. Use last price from 15/01/2015

Fees (optional)

Add transaction Cancel

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Adding cash to your portfolio

- Go in the chosen portfolio (e.g. “My holdings”)
- Click on “Add transaction” button: a window will open (see image)
- Choose “Cash” instead of “Security”
- Select the type of transaction (Open, Debit or Credit)
- Add a description (e.g. “Cash test”)
- Specify the quantity (e.g. 100)
- Choose the currency
- Click on “Add transaction” to complete (you will then see a confirmation screen)

The FT Portfolio tool gives you a third option, “Other” for other types of transactions.

The screenshot shows a modal window titled "ADD TRANSACTION" with a close button in the top right corner. The form contains the following fields and options:

- Portfolio:** My holdings
- Date:** 15/01/2015
- Asset type:** Three buttons: Security, Cash (selected), and Other.
- Transaction:** Three buttons: Open (selected), Debit, and Credit.
- Name or description:** Cash test
- Quantity:** 100
- Currency:** UK Pound (dropdown menu)
- Buttons:** Add transaction (blue) and Cancel (red).

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Your portfolio's page displays your transactions by type: equities, funds and cash.

The "Transactions" tab gives you a breakdown view of all your transactions.

The "Charting" tab provides you with visual representation of the portfolio holdings and allow you to compare them against something else.

The "News" tab will inform you of the latest articles published on FT.com related to your holdings.

You can edit your view by adding and changing columns ("Edit current"). The double-window symbol at the right top of the page opens your portfolio in a new and bigger page where all selected columns are shown.

You can also export the information of your portfolio, either in a Holdings view or a Transactions view, by clicking on the "Export data" link in the highlights bar.

Dashboard • Manage dividends • Set alert • Settings • **Export data** • Help

My holdings ▾ ☆ **Add transaction**

Summary of 4 holdings

1,432.28 **↓ -50,455.82 / -97.24%** **↓ -33,259.37**
 PORTFOLIO VALUE IN GBP VALUE CHANGE TODAY TOTAL GAIN 1 YEAR

Last refreshed less than a minute ago

Holdings **News** ¹⁰ Charting **Transactions**

Selected view: Your portfolio ▾ **Edit current** Create new

Equities 83% of portfolio					
HOLDING ▾	LAST PRICE	TODAY'S VALUE CHANGE	HOLDING VALUE & QUANTITY	TOTAL GAIN/LOSS	ACTIONS
Apple Inc AAPL:NSQ	0.00 USD 21:15 GMT	-76,860.00 -100.00%	0.00 USD 700.00 shares	-7,788.00 -85.77%	🔔 ✓
Pearson PSON:LSE	1,185.00 GBX 14:09 GMT	+2.00 +0.17%	1,185.00 GBP 100.00 shares	+2.00 +0.17%	🔔 ✓

Managed funds 10% of portfolio					
HOLDING ▾	NET ASSET VALUE	TODAY'S VALUE CHANGE	HOLDING VALUE & QUANTITY	TOTAL GAIN/LOSS	ACTIONS
MetLife Benchmark Jupiter India Gross Pension Fund GB00B4YMSK53:GBX	147.28 GBX 14 Jan	0.00 0.00%	147.28 GBP 100.00 shares	0.00 0.00%	✓

Cash 7% of portfolio			
HOLDING ▾		HOLDING VALUE	ACTIONS
Cash test		100.00 GBP	✓

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You can conduct a few operations from the portfolio's page:

- The bell symbol next to a holding allows you to set an email alert against that specific holding and which can include: today's value, news alerts about the company, price alerts and director dealings alerts
- View a detailed view by clicking on the blue arrow and selecting "Edit/view transactions"
- Add shares by clicking on the blue arrow and selecting "Add a transaction"
- Add a note against the holding
- Remove the transaction from your portfolio

Dashboard • Manage dividends • Set alert • Settings • Export data • Help

My holdings ▼ ☆ Refresh Print Add transaction

Summary of 4 holdings


1,432.28 ▼ -50,455.82 / -97.24% ▼ -33,259.37
 PORTFOLIO VALUE IN GBP VALUE CHANGE TODAY ▼ TOTAL GAIN 1 YEAR ▼


Last refreshed 18 minutes ago

Holdings News ¹⁰ Charting Transactions

Selected view: Your portfolio ▼ Edit current Create new

Equities 83% of portfolio					
HOLDING ▲	LAST PRICE	TODAY'S VALUE CHANGE	HOLDING VALUE & QUANTITY	TOTAL GAIN/LOSS	ACTIONS
Apple Inc AAPL:NSQ	0.00 USD 21:15 GMT	-76,860.00 -100.00%	0.00 USD 700.00 shares	-7,788.00 -85.77%	 
Pearson PSON:LSE	1,190.00 GBX 14:16 GMT	+7.00 +0.59%	1,190.00 100.00 shares		

Managed funds 10% of portfolio					
HOLDING ▲	NET ASSET VALUE	TODAY'S VALUE CHANGE	HOLDING VALUE & QUANTITY	TOTAL GAIN/LOSS	ACTIONS
MetLife Benchmark Jupiter India Gross Pension Fund GB00B4YMSK53:GBX	147.28 GBX 14 Jan	0.00 0.00%	147.28 GBP 100.00 shares	0.00 0.00%	

Cash 7% of portfolio			
HOLDING ▲	NET ASSET VALUE	TODAY'S VALUE CHANGE	ACTIONS
Cash test			

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Creating a watchlist

You can create a watchlist to follow items that cannot be bought, such as indices:

- From the FT Portfolio Dashboard, click on the “New Watchlist” button and name your watchlist (e.g. “My Watchlist”), then go in the watchlist
- Click on “Add transaction” button: a window will open (see image)
- Enter the symbol of the indice and add it

You can also watch commodities:

- Go in “Commodities” in “Markets Data”: markets.ft.com/research/Markets/Commodities
- Scroll down and click on the commodity you want to follow (e.g. Gold 100oz)
- Click on the “Add to Watchlist” button in the highlight bar and choose the watchlist (e.g. “My Watchlist”) and confirm

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Your FT Portfolio Dashboard

The FT Portfolio Dashboard gives you a summary of your stock's performances:

- A summary of the overall movements in your portfolios
- A summary of your watchlists
- Details on today's movers

On a selected portfolio, several actions can be done:

- Export a summary of all your portfolio information
- By clicking on the bell symbol, you can create an email alert to get a daily summary of today's value of the holdings in that specific portfolio
- The blue arrow gives the options of adding notes against the portfolio, marking it as default (if you have several portfolios), editing its settings or deleting the entire portfolio.

Portfolio alerts **Export portfolio summary** Help

Dashboard ★ ↻ New portfolio New watchlist

Portfolios summary

51,185.62 ↓ -702.48 / -1.35%
TOTAL VALUE IN GBP ▼ VALUE CHANGE TODAY ▼

Data delayed at least 20 minutes, as of 15 Jan 2015 15:00 GMT. Last refreshed less than a minute ago

Your portfolios		Unrealised	Total return
PORTFOLIO	CURRENT VALUE	TODAY'S VALUE CHANGE	▼ 1 YEAR UNREALISED GAIN/LOSS
My holdings 4 holdings	51,185.62 GBP	-702.48 -1.35%	+15,709.5 +44.41%

Last refreshed less than a minute ago

Your watchlists		Last Activity
WATCHLIST	LAST ACTIVITY	
My Watchlist 1 index, 1 commodity	15:21	

Last refreshed less than a minute ago

Today's movers		Gainers	Losers
GAINERS	LAST PRICE	TODAY'S CHANGE	HELD IN
COMEX GOLD 1 FUTURES CHAIN Front Mon GC.1:CMX	1,258.00 USD 09:42 GMT	+23.60 +1.91%	1 watchlist ▼
MetLife Benchmark Jupiter India Gross Pension Fund GB00B4YMSK53:GBX	147.28 GBX 14 Jan	+2.17 +1.49%	1 portfolio ▼