

5 IMPACTFUL WAYS TO USE YCHARTS

MONITOR MARKETS



- Dashboard
- Custom Email Reports

BUILD PORTFOLIOS & AUTOMATE MODELS



- Model Portfolios
- Excel Add-in

GENERATE NEW IDEAS



- Equity & Fund Screener

RESEARCH, COMPARE & CONDUCT DUE DILIGENCE



- Comp Tables
- Timeseries Analysis
- Quote Pages

VISUALIZE INFORMATION



- Fundamental & Technical Charts

KEY BENEFITS

- Keep track of individual investments, macroeconomic trends and upcoming events & news
- Leverage pre-built templates to evaluate a portfolio
- Run portfolio comparisons
- Test hypothetical performance
- Fully customize a new model or convert a current model for speedy updates & automation
- Uncover opportunities using both qualitative & quantitative filters
- Save screens and activate alerts for when securities enter or exit your screen
- Create custom proprietary Scoring Models to rank your potential investments
- Use data tables to display a large amount of fundamental data for any variety of securities
- Deep dive into the fundamental components of a company or fund including data & news/events
- Illustrate investment ideas on both a macroeconomic & individual security level
- Analyze and display fundamental, technical, performance & correlation trends