Analyze the Overall Sector Exposure of a Portfolio

The Portfolio X-Ray® Report provides in-depth numerical analysis—as well as a visual representation—of the portfolio’s overall sector exposure. Details are provided at both the “Super Sector” level (the three major economic spheres of Cyclical, Sensitive, and Defensive) and the 11 underlying stock sectors.

Discuss Portfolio Diversification

With its visual representations of composition, sector exposure, investment style, and geographical distribution, the Portfolio X-Ray Report is an excellent way to present a synopsis of the portfolio’s diversification, or lack thereof, during client reviews.

Conduct Holistic Portfolio Analysis

Even if you provide advice for only a portion of client’s assets, the Portfolio X-Ray Report is a useful tool for analyzing the client’s complete portfolio. Run a report for all of the client’s assets to show how your recommendations affect the composition, investment style, and sector exposure of the overall portfolio.