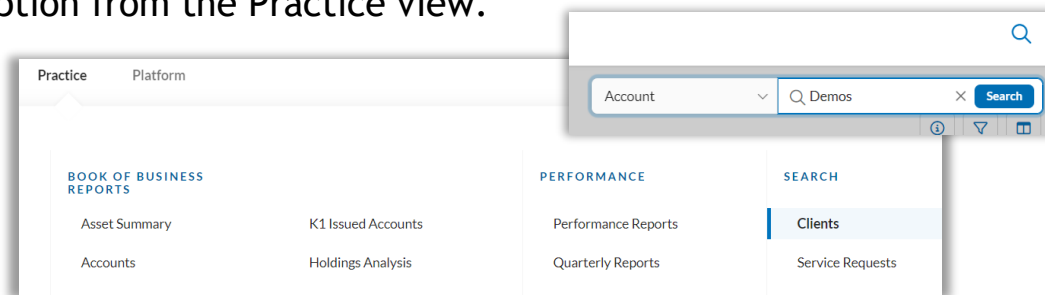


# Account Level Performance.

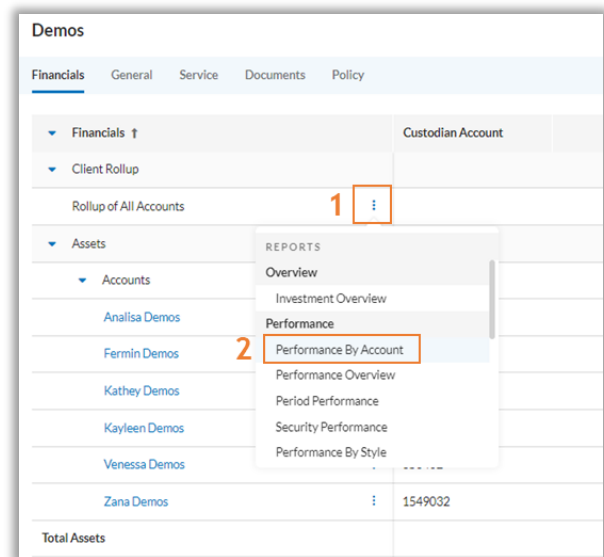


Use the Quick Search to easily search for an account. For a full list of clients, select the Clients option from the Practice view.



From the Client page, select a client from the list, then

1. Select the Kebab icon next to Rollup of All Accounts, and then
2. Select Performance by Account.



The Performance by Account page will display performance for each of the Client's accounts, with QTD and YTD, along with Trailing performance data.

Demos Reports: Rollup of All Accounts As of Jul 3, 2023

Overview **Performance** Activity Holdings

Performance Overview **Performance By Account** Security Performance Period Performance Performance By Style Performance History Of Asset Class

Period: From Inception x Activity Type: Monthly x Clear All

Component/Benchmarks 1 2 3	QTD (TWRR) <sup>4</sup>	YTD (TWRR) <sup>5</sup>	Trailing 1 Yr (TWRR) <sup>7</sup>	Trailing 3 Yrs (TWRR) <sup>8</sup>	Trailing 5 Yrs (TWRR) <sup>9</sup>	Trailing 10 Yrs (TWRR) <sup>10</sup>	From Start Date (TWRR)	Start Date
Analisa Demos   409490	0.10 %	8.91 %	11.68 %	8.23 %	6.20 %	6.90 %	7.42 %	Jan 1, 2010
Fermin Demos   477268	0.04	5.58	7.68	5.17	3.10	4.82	4.62	May 1, 2012
Kathey Demos   629192	0.09	7.55	9.51	3.34	3.22		4.12	Jul 22, 2015
Venessa Demos   429102	0.00	4.66	8.82	7.60	6.44		7.46	Aug 25, 2015