



**Demo 5 - F.A.S.T. Graphs™ Portfolio Construction and Management on [www.fastgraphs.com](http://www.fastgraphs.com)**

**Transcript for video located at:**

<https://www.youtube.com/watch?v=Y6h4E9zOEEY>

One of the most useful features of the F.A.S.T. Graphs™ research tool are the portfolio building functions. Both the Premium and Basic subscriber have access to this tool – however, the Basic subscriber is limited to creating a maximum of 3 portfolios. On the other hand, the Premium subscriber can create an unlimited number of portfolios and also has access to 15 pre-loaded portfolios.

The primary emphasis of this demonstration will be on creating permanent portfolios. However, we would also like to note that it is possible to create temporary portfolios as well.

Temporary portfolios are easy to build but are also easily erased, and will automatically disappear once the user has logged out of the program. Temporary portfolios are created directly in the symbols box on the F.A.S.T. Graph.

Simply type in a series of symbols followed by a space and when your entries are complete hit the “go” button to create the temporary portfolio.

Once the temporary portfolio is created, there is a drop-down window that will allow you to access each of the companies individually. Alternatively, you can scroll through the companies by clicking the black arrow.

To remove the portfolio, you click on the red “X” – where you will be prompted to make sure that you want to remove the list. If you are sure, just hit “OK” and the portfolio list will disappear. You are now back to your traditional F.A.S.T. Graphs default page.

The user can create a permanent portfolio by clicking the “Portfolios” button in the dark brown navigation above the F.A.S.T. Graphs.

This will take you to the portfolio section where you can name and then create a permanent portfolio. Note: for this demonstration we will be creating portfolios utilizing the Premium subscription. Once you’re in the portfolio section, enter the name of your new portfolio in the white space of the tan header titled “My Portfolios” and then click the “Add” button.

This will take you to a section titled “Edit Portfolio Ticker Symbol List” where you simply type in the symbols separated by a space for your new portfolio. Once you input all your symbols, simply click the “Update” button at the bottom. This will take you back to your general portfolio section where you will find your newly created portfolio.

Once your new portfolio is created, you can access it by clicking the “Review” button which will take you to the “Portfolio Review.” Here you can customize your portfolio according to the fundamental metrics of your choice by simply clicking the green tab titled “Customize This Portfolio’s View” and then checking the boxes for your preferred metrics.

Note that as each box is checked, it will automatically appear in the portfolio review area below.

To further customize your portfolio review, you can drag and drop each metric and place it where you would like it to appear on the portfolio review. Note that the metrics are color-coded for the subscriber's convenience.

Unlike temporary portfolios, these portfolios can be kept and maintained for as long as the subscriber wishes.

Permanent portfolios are quick and easy to build and the appropriate fundamental data points can be manipulated and organized to the user's liking.

Once you have designed the portfolio review exactly to your desired metrics and placed them in the order that you prefer, you can permanently save it by clicking the blue "Save This View" button located just above and to the left of the portfolio review and it will turn green indicating it has been saved.

Importantly, each portfolio created is saved individually. In other words, you must go through this saving process for each portfolio you create. This provides the subscriber the ability to create multiple portfolio reviews according to the type of portfolio they have created.

To go back into the general portfolio section simply click the word "portfolios" in the dark Brown navigation bar at the top. As previously mentioned, the Premium subscriber has access to these 15 pre-loaded portfolios that include important portfolios such as the S&P 500, Dividend Aristocrats, and others. Premium subscribers can create an unlimited number of additional portfolios. The Basic subscriber can create a maximum of 3 portfolios and will not have the 15 pre-loaded portfolios.

To add or delete ticker symbols from a portfolio, click on the "Edit Tickers" button, make your changes and click "Update." To delete a portfolio, click on the "Edit Tickers" button, delete all of the symbols and click "update." Once you have created a portfolio, there are 4 buttons next to each created portfolio- "Review-Graph-Edit Tickers-Edit B/S." The "Review" button takes you directly back into the portfolio review section.

The "Graph" button takes you directly into F.A.S.T. Graphs™ with the portfolio included with a drop-down of all the companies in your portfolio. This allows you to quickly go through each portfolio selection by utilizing either the drop-down or by clicking the black arrow.

The "Edit Tickers" button allows you to add and delete companies in your portfolio.

Finally, the last button stands for "Edit Buy/Sell" – which allows the user to put buy or sell dots directly onto the F.A.S.T. Graphs™.

This important feature allows you to keep track of the buy, sell or hold decisions you have made in your portfolio. Perhaps the best feature of the portfolio function of the F.A.S.T. Graphs™ research tool is the ability to manage your own portfolio with more transparency and perhaps clarity than ever before.

By simply clicking on the "Edit Buy/Sell" button, you will be able to input buys and sells on any stocks that you own in your portfolio so that you can review the success or failure of your past decisions.

For the example, we have already inputted a buy and sell for McDonalds.

Additionally, if you have your buy / sell data available in excel format, you can simply copy and paste the information into this box “Paste Excel 6 Columns Here” and it will automatically populate by hitting the space bar once. Note that the order of the data must be the same, now hit “Update.”

By clicking on the “Go Back to Portfolios” button, we go back into the portfolios section.

Now let’s look at the buy/sell dots that we have created with the buy and sell list, by simply clicking on the “Graph” button.

This will take us into our portfolio in the regular F.A.S.T. Graphs™ section.

Once back in the default F.A.S.T. Graphs™, we can select the company from the drop down.

For example, this green dot shows when you bought MCD and the detail appears in a pop up when you point your cursor to the green dot. If there is any selling being done, this is shown with a red dot. If you point your cursor to the red dot the details of how much you sold and the proceeds will appear in the pop up.

When we go to Procter & Gamble (PG) there are two things to note. First, the gold line represents the average cost basis. This will show up on both your historical graph and the Estimated Earnings and Return calculator.

Note: if you’ve completely sold out of the position, as we have with McDonalds with this example, the gold average cost basis line will disappear.

Additionally, just below the historical Earnings and Price Correlated graph there is a blue bar titled “Portfolio Transactions.” By clicking on this tab, it will give you a summary of your buys and sells.

In order to add a new stock or stocks to your portfolio, you utilize the same procedure that you used to create the portfolio. First, you would add the new name or names to the portfolio by entering their symbols into the edit tickers box and then clicking “Update.”

You can then hit “edit buy/sell” and you can add your buy and sell dots to your new additions by simply adding “B” for buy, the date of purchase, the number of shares purchased and the per-share price (note: you do not have to fill in the total amount as the tool will make the calculation for you).

Once you have completed that process, simply hit “update” and your new purchase will now be included into your portfolio.

By “going back to the portfolios,” we can then go into the graphing function. Once back in the graphing function, you can go through each of your portfolio holdings by hitting the drop-down window or the black arrow.

This is the fifth demonstration video. The F.A.S.T. Graphs™ portfolio research tool brings a level of transparency and clarity to portfolio management like no other tool we have seen before. (End of document.)