How do I view performance and analysis information for an investing account?

Investment accounts have an associated Holdings page where you can track performance metrics at the account level. You can also obtain this data by filtering the Investing tab Performance page to show results for just a single account, but it's usually more efficient to use the account's Holdings page for account level data, and the Investing tab for data on your entire Portfolio or for broad groups of accounts.

Available snapshots include account value, recent performance, historic performance, and tax implications. For more information about specific snapshots, see the portfolio performance and asset allocation sections of Help.

1. In the **Account Bar**, click the investing account you are interested in.
2. Click **Holdings**.