

How do I see the value of my portfolio?

See the value of my portfolio

What was your market value the day before that big spike in the NASDAQ? The day after? The [Security Detail View](#) shows the price history of an individual security; the Portfolio can do the same for your portfolio as a whole. The Portfolio Value vs. Cost Basis snapshot tracks the relationship between these two important indicators.

View the Portfolio Value vs. Cost Basis snapshot

1. Click the **Investing** tab.
2. If necessary, click the Performance button at the top of the page. (Quicken Premier, Home & Business, and Rental Property only)
3. Scroll the window until you see the **Portfolio Value vs. Cost Basis** snapshot (Quicken Premier, Home & Business, and Rental Property only).
4. Use the options on the Performance page to filter this snapshot by account, date, and security.

Notes

Quicken relies on accurate and complete data to derive reliable performance measures. To view certain performance measures, it may be necessary first to [replace placeholder entries with complete historical data](#).

View market value in the Portfolio window

1. Click the **Investing** tab.
2. If necessary, click the **Portfolio** button at the top of the page.
3. In the **Show** list, select **Value**.
4. In the **Group By** list, select **Accounts**.
5. The market value of your portfolio appears at the bottom of the screen (at the bottom of the Market Value column), and includes both securities and cash.

Notes

Grouping the **Portfolio** window by **Accounts** will give you the most accurate market value picture.