

# How do I view my Average Annual Return (IRR)?

## View my average annual return (IRR)

The Average Annual Return snapshot shows the average annual return (also known as IRR) for your investment holdings. Indexes shown in this snapshot are [those included in your Security List](#).

To learn about how this important and widely used investment performance indicator is calculated in Quicken, see [Understanding the investment performance calculations used in Quicken](#).

## View average annual return (IRR) in the Investing tab

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. On this page, the Average Annual Return snapshot (Quicken Premier, Home & Business, and Rental Property only) expresses your total return as an annualized figure.
4. Filter the accounts and securities included in the snapshot by using the Show Accounts and Choose Securities options at the top of the window. (Optional)

### 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](#).

For an expanded definition of average annual return, see [Understand the investment performance calculations used in Quicken](#).

## View average annual return (IRR) in the Portfolio window

1. Click the Investing tab.
2. If necessary, click the Portfolio button at the top of the page.
3. Click Options > Customize current view.
4. In the Available Columns list, click to select any of the Av. Annual Return columns (1, 3, or 5 year) that you wish you add to the current view.
5. Click Add to add the selected column to the Displayed Columns list on the right.
6. Click OK.

### Notes

- **Calculations are based on the latest available price for the security**

Calculations are based on the latest available price for the security as of the requested date. The calculation for individual securities reflects price changes and dividends credited; it does not reflect dividends that occurred while a position was not held in that security.

- **Average annual return is available for accounts and securities only**

The Portfolio displays average annual return (IRR) values for individual accounts and for individual securities. It is not calculated when the portfolio is grouped using other methods such as Goal or Industry. When the Portfolio is grouped by Account, the total average annual return for all accounts is also displayed.

- **Calculations are based on the full period of the named range**

- Average Annual Return 1-Year measures average annual return for the last 12 months. In order to get a meaningful calculation, you must have held a given security for a full year.
- Average Annual Return 3-Year measures average annual return for the last 36 months. In order to get a meaningful calculation, you must have held a given security for three full years.
- Average Annual Return 5-Year measures average annual return for the last 60 months. In order to get a meaningful calculation, you must have held a given security for five full years.

If you see N/A in one of these columns, it may be because you've not held a given security for the full period required the calculation. Try using a column with a shorter time period.

- **Average annual return is affected by hidden accounts and securities**

If necessary, [customize the Portfolio](#) to include or exclude hidden accounts and securities in your calculations.

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