

How do I create investment reports?

Quicken's investment performance reports and graphs can help you evaluate your investment portfolio and the price histories of your securities. Among other things, you can find out how well your securities are performing, view trends in the prices and market value of a particular security, view the annual total return for a specific security during a particular time period, see where your assets are allocated, and see a convenient report of all your investment transactions.

To see how your investments are performing, create an [investment performance report or graph](#).

Most investment actions have a category associated with them. If you clear either the action or its corresponding category in the report, their transactions will be excluded.

Investment actions and associated categories

Category	Action
_DivInc	Div, DivX, or ReinvDiv
_IntInc	IntInc or ReinvInt
_LT CapGnDst	CGLong, CGLongX, or ReinvLg
_MT CapGnDst	CGMid, CGMidX, or ReinvMd
_RlzdGain	Sell or SellX, or Buy or BuyX if you short the security
_ST CapGnDst	CGShort, CGShortX, or ReinvSh
_DivInc TaxFree	Div, DivX, ReinvDiv on a security that is tax-free
_IntExp	MargInt
_IntInc TaxFree	IntInc, ReinvDiv on a security that is tax-free
_EmpStkOptInc Employee Stock Option Inc	Exercise, ExerciseX

Notes

The _UnrlzGain and _Accrued Int categories have no corresponding actions. Transactions categorized as _UnrlzGain can appear in a report if the price of a security changes. You can use the _Accrued Int category with MiscExp, MiscInc, MiscExpX, or MiscIncX transactions. The _MT CapGnDst category and its associated actions applied to the 1997 tax year, when medium-term holdings were possible.

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](#).