

About managing my portfolio's asset allocation

Asset allocation is the process of spreading your assets across several types of investments to control your potential risk and return. When you allocate your investments, you invest different percentages of your portfolio in asset classes such as large cap stocks, small cap stocks, bonds, and so on. The result is your asset allocation (also called an investment mix).

Quicken provides several tools to help you set a risk/return target that meets your individual risk tolerance, assess your current asset allocation, and set a target asset allocation that matches the risk/return you're comfortable with.

In addition to helping you understand how your portfolio is allocated by asset class, Quicken Premier and Home, Business & Rental Property users have access to Portfolio X-Ray analysis which looks deep into mutual funds, ETF's, and other equity funds to reveal your true exposure in individual equities.

What can I do?

- [How do I download asset classes?](#)
- [How do I view asset class definitions?](#)
- [How do I view my current asset allocation?](#)
- [How do I monitor my portfolio's asset allocation?](#)
- [Tell me about analyzing my portfolio with X-ray analysis](#)
- [How do I rebalance my portfolio?](#)