



Client Communication Charting Tool - Events Analysis

- **Report:** EDU_STUDY_BETA.RPT
- **Run Date:** 2023-08-08
- Please send comments/suggestions/issues to the [NDR Product Team](#)

► Step-by-Step Explanation Guide

► Report Notes

Switch to Standard Controls

Step 1: Asset Selection

Available Assets: [Select All](#)

Balanced_Portfolios:

100% Bonds
10% Stocks / 90% Bonds
20% Stocks / 80% Bonds
30% Stocks / 70% Bonds
40% Stocks / 60% Bonds
50% Stocks / 50% Bonds
60% Stocks / 40% Bonds
70% Stocks / 30% Bonds
80% Stocks / 20% Bonds
90% Stocks / 10% Bonds
100% Stocks

NDR_Portfolios:

Smart Sector with Catastrophic Stop
Smart Sector Fixed Income
Smart Sector International
Dynamic Allocation (Conservative)
Dynamic Allocation (Moderate)
Dynamic Allocation (Aggressive)
Dynamic Allocation (ESG)

Add Assets

Remove Assets

Assets Selected: [Select All](#)

Individual_Tickers:

Balanced_Portfolios:

NDR_Portfolios:

Fixed_Income_Sectors:

Stock_Indices:

US_Cap_and_Style_Stock_Indices:

SP500_Sectors:

Commodities:

Alternatives:

Next Step

☐ Individual Ticker Entry

Skip to: [Step 1: Asset Selection](#)