Viewing Client Risk Statistics in the Performance Viewer App

When creating a client portfolio, one of the most important factors to consider is risk. The term “risk” may have negative or scary connotations in a client’s mind, but with the right tools in place you can illustrate the importance of bearing investment risk and the possible rewards it can bring.

What?

Using the Performance Viewer app, you can view risk statistics and ensure that your clients’ portfolios are taking on the right amount of risk to meet their financial objectives. The Statistical Summary within the Performance Viewer highlights standard deviation, alpha, and beta for your clients’ portfolios. These measurements give a good indication if changes need to be made within the portfolio should the risk be too high or too low.

How?

You can view your client’s portfolio risk within the Performance Viewer. You can also print a report to assist in client meetings. This will help illustrate your trade rationale should you decide your client’s portfolio risk needs to be re-aligned.

To access your client’s portfolio risk via Statistical Summary:

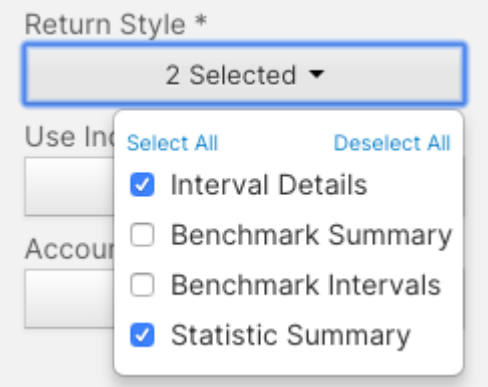
1 – Navigate to the Performance Viewer app.

2 – Enter in the Household, Registration, or Account you wish to view these statistics for.

3 – Make sure the date range is correct and add in any additional time periods you would like to view.

4 – Add in any lower level groupings in the “Groupings” section.

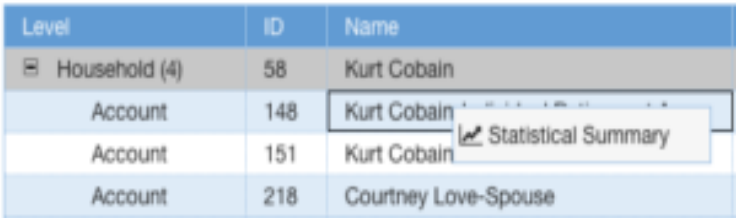
5 – Under “Return Style”, check the box by “Statistic Summary.”



6 – Click “Calculate.”

7 – Once the results have loaded, click on any entity in the “Summary” section to select it.

8 – Then right-click and select “Statistical Summary.”



From the “Statistical Summary” screen you can view risk statistics such as standard deviation, alpha, and beta for any grouping or benchmark loaded for the period. You can also select a new date range to view different time periods.

Using the Performance Viewer app to access risk statistics can help keep your clients on track to meet their long term financial objectives.

If you have questions or need help navigating the Performance Viewer please contact the Orion Performance team at performance@orionadvisor.com

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