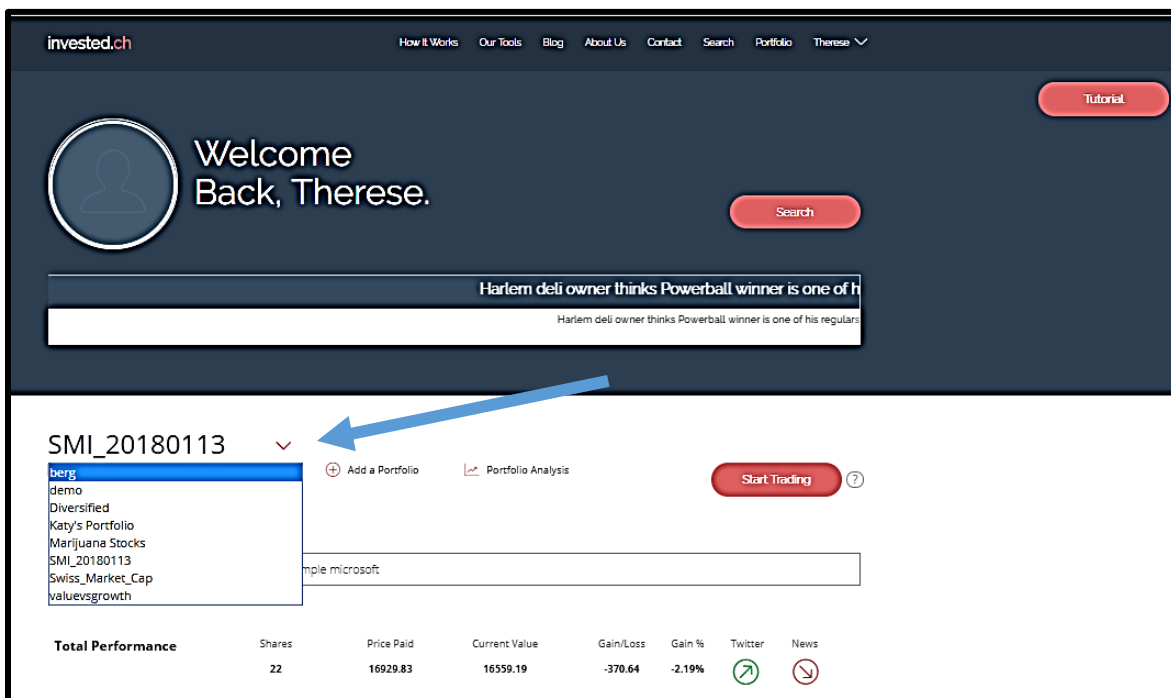
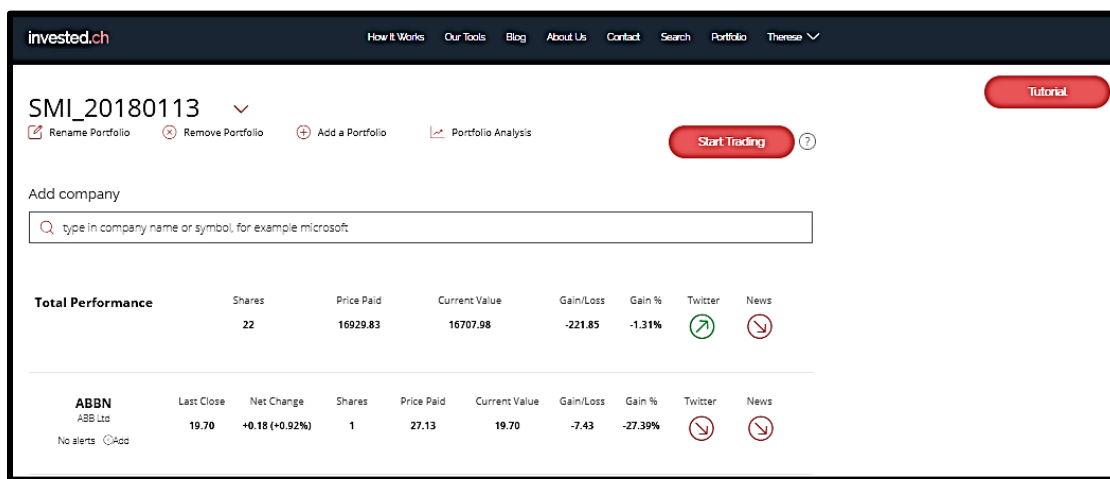


## Maintaining Portfolios

- a. After signing in you will be presented with the possibility to choose a portfolio or create a new one. Clicking on the little dropdown symbol next to the portfolio name, all of your portfolios are visible. Choose one to work on, or create a new portfolio with the Add a Portfolio button.



- b. On the portfolio page the top line presents the total number of shares owned, the total price paid, the total current value, the total net current gain or loss and the total percentage gain or loss. The underlying lines show the same information for each stock as well as the last close and net change



c. **Add the companies you know and want to watch.**

You can add companies by entering either their company name or the symbol that they are traded by. For example Apple has the symbol AAPL, Microsoft uses the symbol MSFT, and Swisscom has the symbol SCMN.

If you add a name that is not found, this search page will open. Here you can narrow down your choices by selecting a company's country, branch and the stock market it is traded on. You can choose all of the pharmaceutical companies in Switzerland traded on the Swiss Stock Exchange. This makes it easier because these are the competitors in Switzerland and the transaction fees don't include currency exchange rates

invested.ch

How It Works Our Tools Blog About Us Contact Search Portfolio Therese ▾

Tutorial

Find the companies that match your preferences. Type in a company name or make selections in the search fields and

swiss re

.Switzerland ▾ All Industries ▾ SIX SWISS EXCHANGE ▾

All companies ▾

**SREN** Swiss Re AG  
Market: SIX SWISS EXCHANGE  
Industry: Financial Services  
Market Capitalization: 21.02 B

Country: CHE  
P/B Ratio: 0.85  
P/E Ratio: 10.16

Performance: -2.37%  
Dividend: 5.62%  
Record Date: 4/25/2018

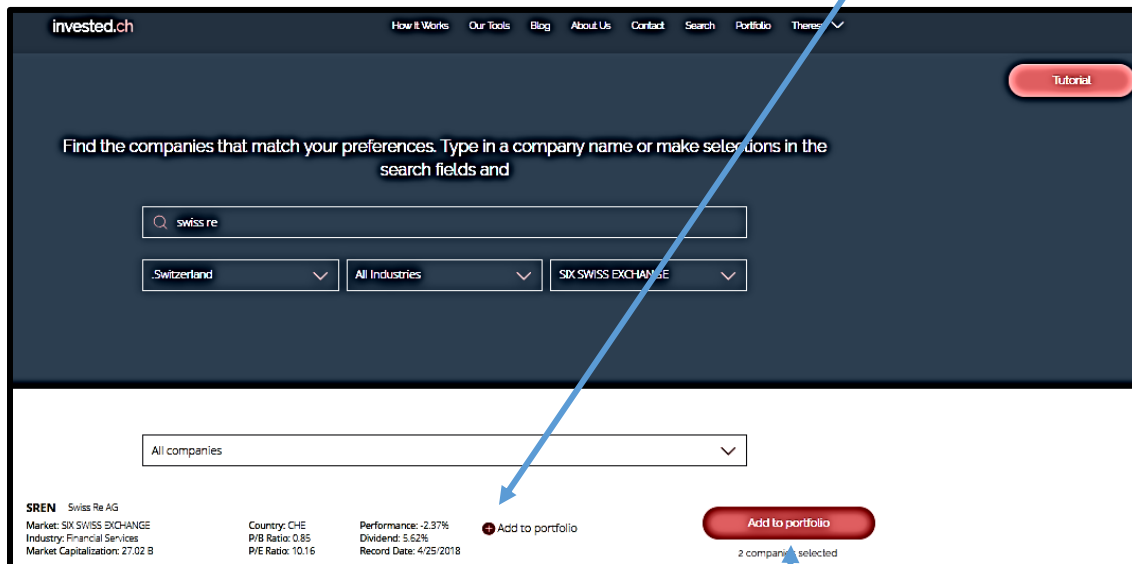
+ Add to portfolio

Add to portfolio

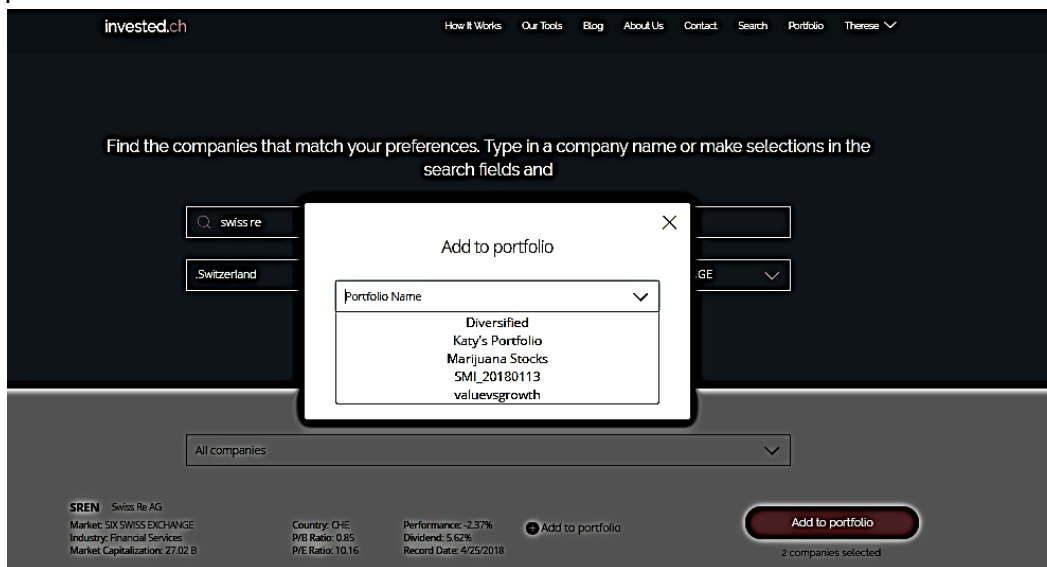
0 companies selected

Adding Swiss Re to a portfolio, type in the company name "Swiss Re", the country it is based in "Switzerland" and the stock exchange I want to trade it on "SIX SWISS EXCHANGE". When the company is found, it is listed below like here.

d. Clicking on the Add to Portfolio + sign, a red circle should be visible like here



To actually add this stock to your portfolio, click on the red button here. This is a 2-step process because if you had chosen a country, industry and/or exchange, you would have had a list of companies and been able to add many different companies at once, choosing each individually and then adding all of them. Clicking on the red button takes you here, where you can choose which of your portfolios to actually add your stock picks to.



e. To change the number of shares and the price paid

The screenshot shows the 'invested.ch' website interface. At the top, there is a navigation bar with links: How It Works, Our Tools, Blog, About Us, Contact, Search, Portfolio, and Therese. Below the navigation bar is a search bar labeled 'Add company' with a placeholder text 'type in company name or symbol, for example microsoft' and a 'Tutorial' button. The main content area displays a table with the following data:

Total Performance	Shares	Price Paid	Current Value	Gain/Loss	Gain %	Twitter	News
	22	16929.83	16763.13	-166.70	-0.98%	⬇️	⬇️

Below the table, the 'ABBN' row is expanded, showing the following data:

ABBN	Last Close	Net Change	Shares	Price Paid	Current Value	Gain/Loss	Gain %	Twitter	News	
ABB Ltd	19.89	-0.38 (-1.85%)	1	27.13	19.89	-7.23	-26.65%	⬇️	⬆️	🗑️

A blue arrow points to the company symbol 'ABBN' in the first column of the expanded row.

- i. Put the cursor over the company symbol here.
- ii. The symbols to edit or to delete the position will become visible here.
- iii. Click on the upper symbol, the edit symbol, the following options will appear.

The screenshot shows the 'invested.ch' website interface. At the top, there is a navigation bar with links: How It Works, Our Tools, Blog, About Us, Contact, Search, Portfolio, and Therese. Below the navigation bar is a search bar labeled 'Add company' with a placeholder text 'type in company name or symbol, for example microsoft' and a 'Tutorial' button. The main content area displays a table with the following data:

Total Performance	Shares	Price Paid	Current Value	Gain/Loss	Gain %	Twitter	News
	22	16929.83	16763.13	-166.70	-0.98%	⬇️	⬇️

Below the table, the 'ABBN' row is expanded, showing the following data:

ABBN	Last Close	Net Change	Shares	Price Paid	Current Value	Gain/Loss	Gain %	Twitter	News	
ABB Ltd	19.89	-0.38 (-1.85%)	<input type="text" value="1"/>	<input type="text" value="27.13"/>	19.89	-7.23	-26.65%	⬇️	⬆️	🗑️

A blue arrow points to the 'Save Changes' button in the top right corner of the expanded row.

- iv. The Number of Shares as well as the Price Paid can now be changed. Enter the number of shares bought and at what price. Click on the Save Changes button here.
- v. To delete a company from your portfolio click on the trash can here.