



## BarclayDataFinder Help

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### To Use the Portfolio Calculator:

**Before you can use the Portfolio Calculator**, you must create a Quicklist. To do this, search for the hedge fund manager profiles and CTA profiles you want. In the Results window, click the "[+]" next to the fund name to add it to the Quicklist. You must have at least three funds in the Quicklist to use the Portfolio Calculator.

1. Click the red "View Quicklist" button. A small "Quicklist" window pops up.
2. Click the "Portfolio Calculator" button.  
The Portfolio Results page appears. *If you purchase a subscription to a BarclayHedge database that contains performance data, you can use DataFinder Pro to allocate equity.*
3. Choose the portfolio start date and end date.
4. Click the red "View Portfolio" button at the bottom of the page.  
The portfolio results appear. The portfolio's performance over time is shown, with monthly, quarterly and annual changes. In the Portfolio Details section, the Performance Statistics include return stats, wins and losses, best and worst 12 months, correlation against the Barclay Ratio, Efficiency Ratio, Sharpe Ratio, Sortino and Sterling.
5. To change the dates, click the red "Enter New Dates" button at the bottom of the page. To return to your list of results, click "Results" near the top of the page, or click the "Back" button in your browser. If you changed the dates or edited the portfolio more than once, you will have to click multiple times.