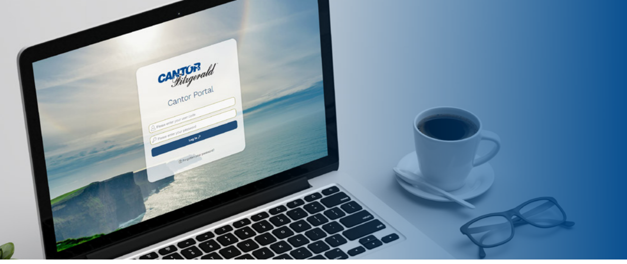
Your portfolio
at your fingertips

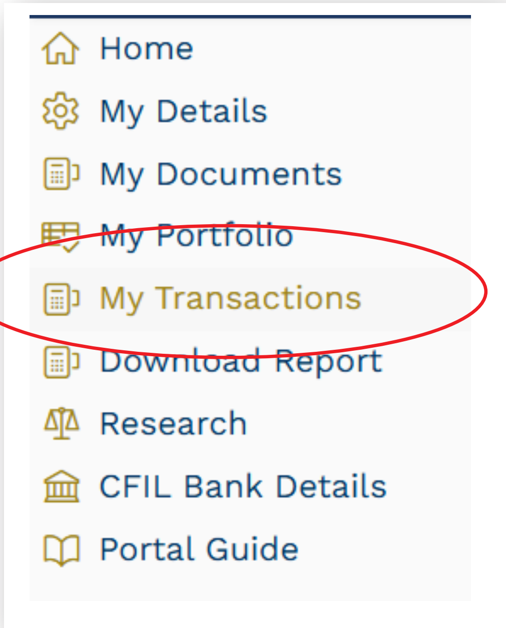
Guide to Reports on your **Client Portal**

All your account information
viewed in one place, through a single login.

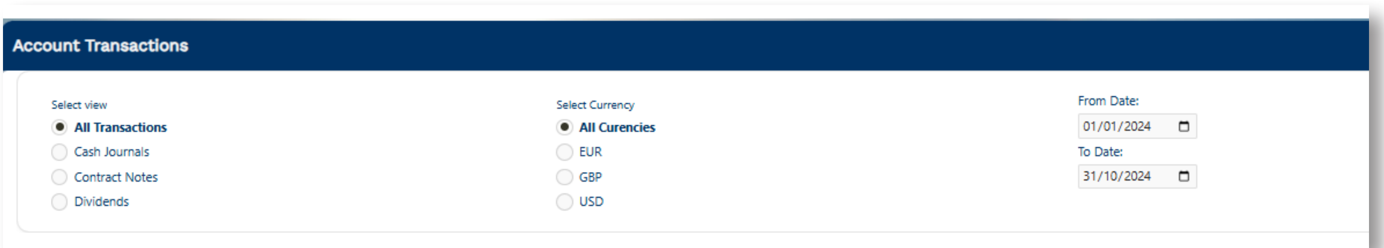
CANTOR Fitzgerald



My Transactions

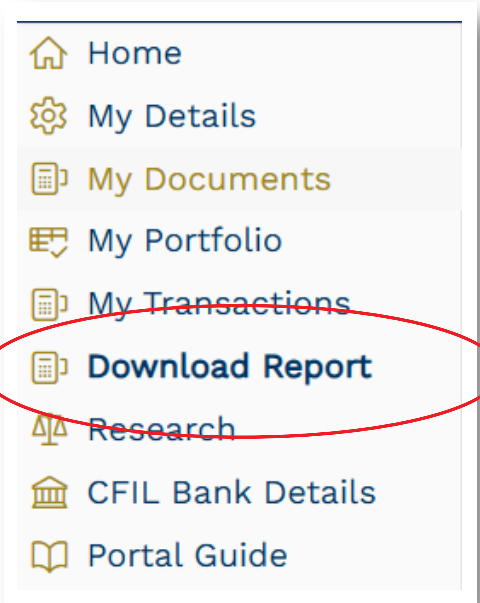


You can view all your transactions at the click of a button. Open the My Transaction module and your transactions are shown in date order, Newest to Oldest.



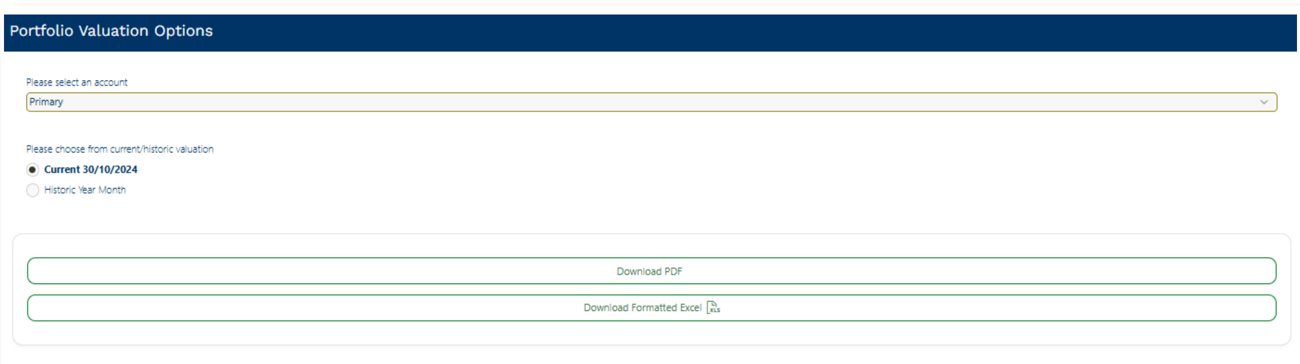
You then have the option to filter by, Cash Journals, Contract Notes & Dividends or by Currency. You can also Select Currency and choose your Date Range.

Download Reports



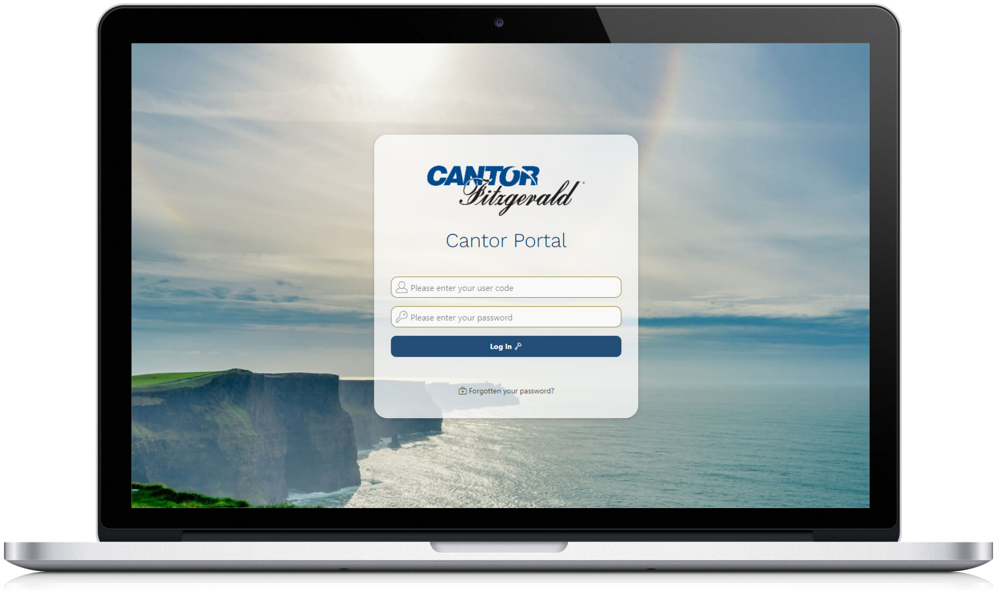
On your portal, open the Download Reports tab.

By default, you will be directed to the Portfolio Valuation option. From here you can download a current or historic valuation of your account a PDF of Excel format.



You can also choose to run any of the following reports from the Download Reports tab in your portal;

1. Portfolio Valuation (current or historic)
2. Transaction Statement
3. Trade Listing
4. Dividend Listing



Should you have any questions about this guide or your client portal,

please contact our **Client Services team on 01 633 3800**.

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