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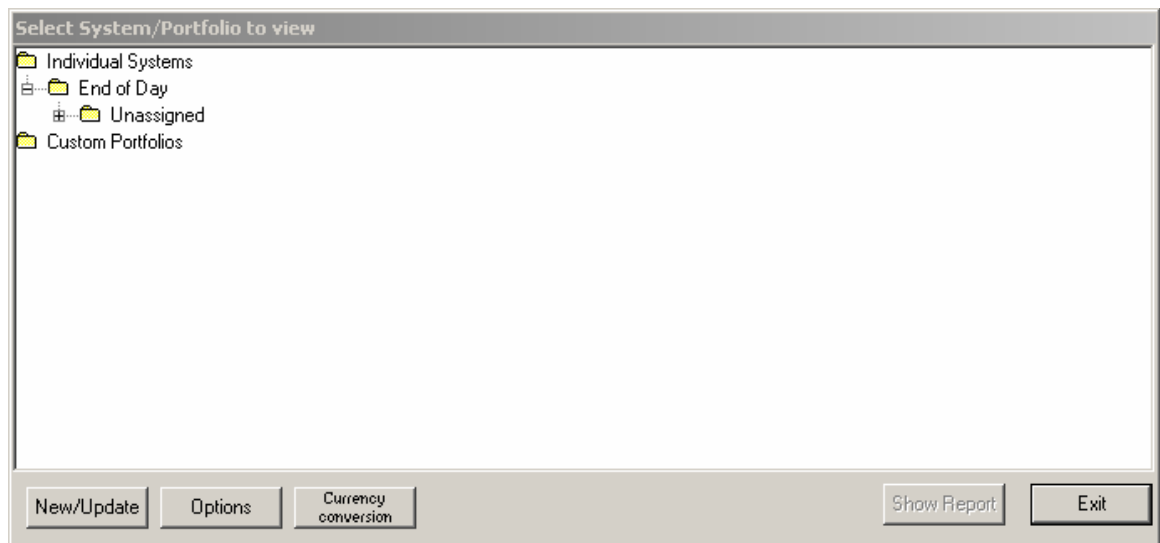
## PortfolioStream 6


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### **Combining Portfolios**

Single markets, multiple portfolios, or any combination of these items can be combined from a PortfolioStream database into a new portfolio. This document explains how to combine existing data.

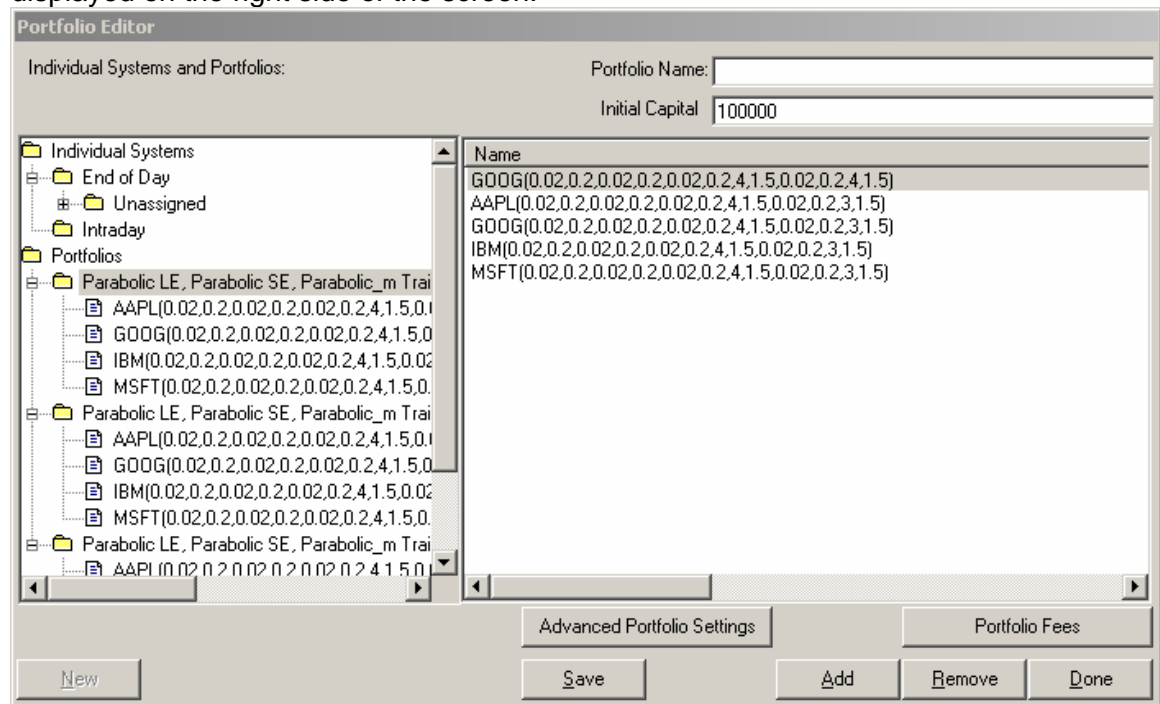
1. On the menu bar, go to File → Custom Portfolio Viewer.
2. Select the database (ECD file) where the data is stored. Click **Open**. All available portfolios will be displayed.



- To create a new combination portfolio, click the **New/Update** button in the lower left of the screen. 

The **Portfolio Editor** will appear. Click the **New** button in the lower left of the screen. 

- Click on the (+), or double-click on the folder name to expand the portfolios and to present the data to be combined in the new portfolio.
- Select the individual market for the new portfolio by double-clicking on the name of the market. If an entire portfolio is to be added to the new one, then double-click on the folder name of the portfolio. Selected markets and portfolios will be displayed on the right side of the screen.



- Assign a name under **Portfolio Name** at the top right of the window.
- Assign **Initial Capital** to the new portfolio, if it is different from the default value.

- Additional settings can be applied to the Weight, Margin, and Sector of the new portfolio by editing the fields in the **Advanced Portfolio Settings**.

**Advanced Portfolio Settings**

Weight | Margin | Sector

Portfolio System	Market	Weight
GOOG(0.02,0.2,0.02,0.2,0.02,0.2,4,1.5,0.02,0.2,4,1.5)	GOOG	1
AAPL(0.02,0.2,0.02,0.2,0.02,0.2,4,1.5,0.02,0.2,3,1.5)	AAPL	1
GOOG(0.02,0.2,0.02,0.2,0.02,0.2,4,1.5,0.02,0.2,3,1.5)	GOOG	1
IBM(0.02,0.2,0.02,0.2,0.02,0.2,4,1.5,0.02,0.2,3,1.5)	IBM	1
MSFT(0.02,0.2,0.02,0.2,0.02,0.2,4,1.5,0.02,0.2,3,1.5)	MSFT	1

OK Cancel

- Under the **Portfolio Fees** button, additional settings can be adjusted as needed.

**Portfolio Fees**

Management Fee

Period: Monthly Value: 0 %

Management Fee calculated on Initial Capital only

Performance Fee

Period: Monthly Value: 0 %

OK Cancel

- When all settings are customized for the new portfolio (if desired), then click **Save**, then **Done**.
- The new portfolio will be shown in the list of all available portfolios. Double-click on the portfolio or click the **Show Report** button to view the data.