# Portfolio Allocation

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Allocation as of [InputParameter.startDate] | Top 10 Holdings   |  |  |  |  | | --- | --- | --- | --- | | Symbol | Security | Market Value | % Assets | | [Security.symbol] | [Security.name] | [MarketValue] | [%Assets] | | Top 10 Holdings Total | | **=Sum(Above)** | **[TotalPerAsset]** | |
| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | Industry Sector | Market Value | % Equity | % Assets | | | [Sector.legendURL] | [GroupedSecuritySector] | [SectorMarketValue] | [%EquitiyBySector] | | [%AssetBySector] | |  | **Equity Total** | **[TotalMarketValue]** | **[TotalEquityPercent]** | **[TotalSectorPer]** | | | Allocation by Asset Class |