

Personal Rate of Return Analytics

Give participants deeper insights into their retirement account's performance with Schwab RT's personal rate of return (PRR) analytics, powered by dailyVest.

Features and benefits

- Consolidated, interactive views of personal fund performance
- Integrated dashboard (optional) or standalone views
- Robust filter options, letting participants customize views by asset class, money type, fund, period, and allocation
- Allocation pie chart, various Rate of Return charts, and Investment Activity Summary table
- Built-in chart tutorials and calculation details
- Visualizations with context-sensitive performance indicators
- Ability to interact with visualizations using zoom, hover, and drill-down controls to obtain detailed or custom information



Personal rate of return dashboard. For illustrative purposes only.