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1. Introduction

Welcome to the YPIM, designed to aid retail investors in managing their portfolios with ease and sophistication. This guide will walk you through using our software to its full potential.

2. Installation

- **Windows:** Download the installer from our website and follow the installation prompts.

3. Getting Started

Logging In:

- Enter your username and password. If you're new, click on "Register" to create an account. The "Register" will take you to the website where you can register an account. New registered account will have 3 days of free trial time.

Understanding the Dashboard:

- **Home:** Overview of your current financial status and quick access to features. It also recommends an asset list tailored to your risk profile and financial goals.
- **Financial Planning:** Manage your financial assets and liabilities.
- **Risk Assessment:** Evaluate your investment risk tolerance.
- **Progress Tracking:** Monitor your financial health over time.
- **Financial Prediction:** Forecast company financial statements.
- **Valuation:** Perform stock analysis.

4. Financial Planning

- Go to "Financial Planning".

- Add assets and liabilities by clicking on "+" buttons under respective sections. Assets are anything from your future income, including your future income, liabilities are anything from your future spending, including your future plans like setting up an education fund for your children.
- Enter details like name, type, and value for each item.
- Net Worth reflects the total assets deducted by total liabilities, a net worth over 0 signals your financial situation is healthy and could possibly add new financial goals, if net worth falls below 0, it signals a proper investment is required or adjustment of some financial goals.
- Save your balance sheet for progress tracking, for future reference or print for records.

5. Risk Assessment

- Select "Risk Assessment" from the sidebar.
- Complete the surveys for Risk Appetite and Risk Capacity to determine your risk profile. Noted, both surveys should be completed to have your final risk level, the software assesses your risk profile by combining the results of your risk appetite and capacity surveys.

6. Progress Tracking

- Under "Progress Tracking", view timelines of your cash flows or cumulative cash outflow burdens.
- Use buttons on the top left corner to switch between different visualization types.

7. Financial Prediction

- Access this feature to predict future financial statements.
- Input the stock symbol, select period type, and number of periods.
- Expand financial metrics by the "+" on the left of the high level of financial metric to add specifics, add prediction periods on the top right corner, tailored to your understanding and assumptions. Currently 30 periods is limited for prediction.
- Prediction button helps you generate a quick prediction over the next couple years, but always check those numbers before you use them.
- Generated prediction numbers like cash flows and P/E ratios can later be used for valuation.

8. Stock Valuation

- Navigate to the "Valuation" tab.
- Enter the stock symbol you want to analyze.
- Select a valuation method from the dropdown (DCF, DDM, or P/E).
- Input the required parameters based on the method chosen.
- Click "Calculate" to get the valuation results, which will display in the text area below.
- Save the calculated valuation or use different methods to get a valuation you seem correct.

9. Settings and Updates

- From the settings menu, you can adjust user preferences or check for software updates.

10. Troubleshooting

- **Login Issues:** Check your internet connection or reset your password if forgotten.
- **Calculation Errors:** Ensure all inputs are numeric in the correct format.
- **Connection Errors:** Verify server status or contact support if issues persist.