

Portfolio Stress Testing

The Details

What is Portfolio Stress Testing?

Stress Testing is about assessing the potential impact of economic scenarios (e.g. oil crash, inflation, etc.) on your portfolio and other investments.

How It Works



HiddenLevers measures how oil prices impact Exxon, how home sales impact Lowe's, and millions of similar relationships between the economy and investments.

We create what-if scenarios to model recessions and other economic events. For example: What if the 2008 Recession happens again?

In a stress test, we use the relationship between an investment and an economic indicator to project possible performance. For instance: if Exxon usually falls 3% when oil falls 10%, then Exxon would lose 15% if oil fell 50%.

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