

Calculate YTM and Modified Duration

Prerequisites

We assume you have all prerequisites you may need, including:

1. [Get Access to Finmars](#)
2. [Link with Finmars ID](#)
3. [Install PMS Core or PMS Plus add-on](#)
4. [How to Import Files in PMS Core and PMS Plus](#)

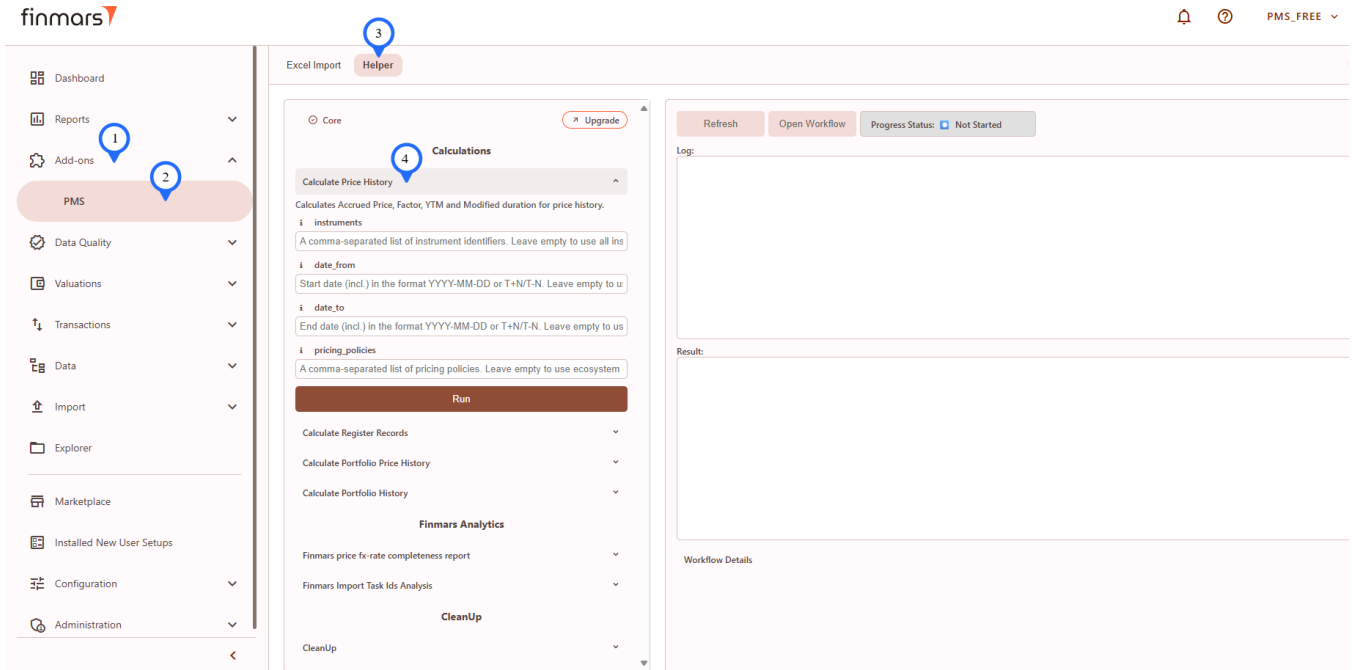
When to use

It's expected that all calculations are run by respected workflows and or pipelines, but sometimes there is a time you need to run it manually, the most frequent cases are:

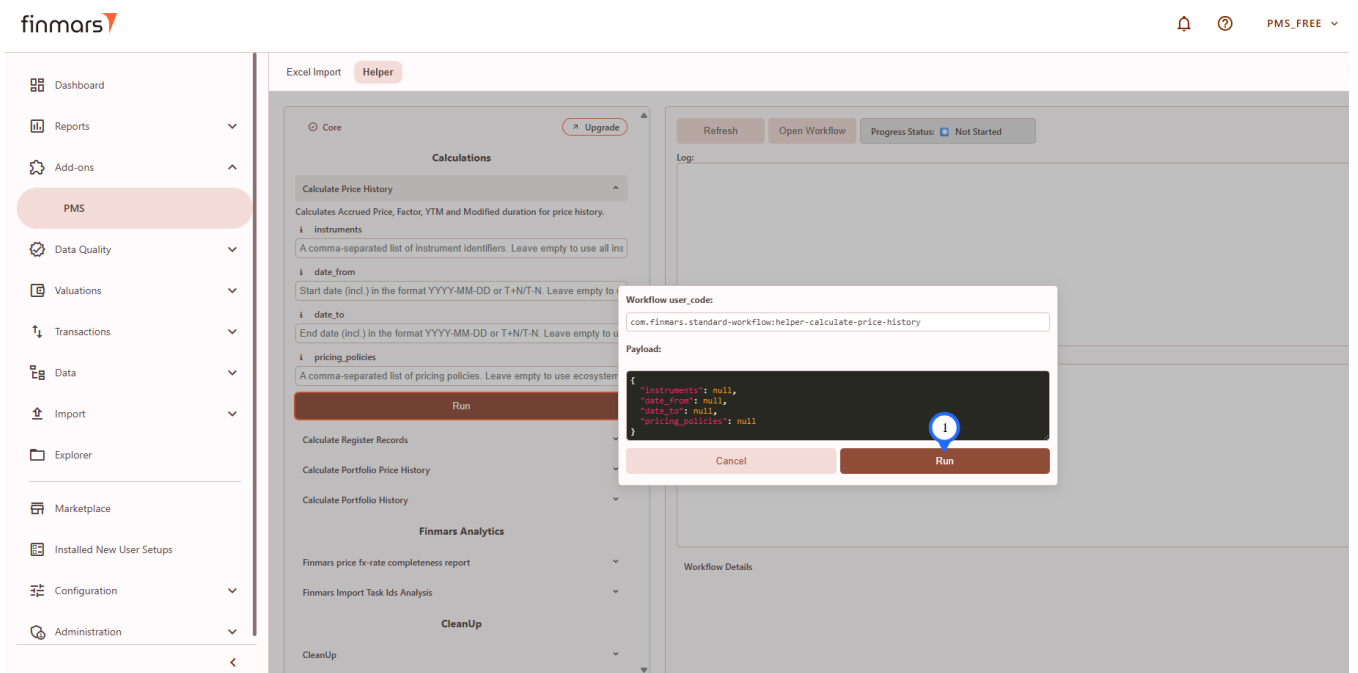
1. You made **manual edits in the data** that will affect YTM and Modified Duration - this WILL NOT be automatically recalculated;
2. You **unchecked calculation options** in the PMS Core/PMS Plus and/or other add-ons and/or pipelines;

Calculate YTM and Modified Duration

1. Go to **Add-ons -> PMS** here go to the **Helper** tab and open **Calculate Price History** section.



2. **Fill in parameters** according to their **info** ("i" icon close to the parameter's name).
3. Click **Run**.
4. Confirm parameters and click **Run** again.



5. In the right frame you will have execution info, click **Refresh** to get updates.

The screenshot shows the Finmars PMS interface with the 'Excel Import' workflow selected. The 'Calculations' section is active, and the 'Run' button is highlighted. The 'Log' section shows the workflow progress, and the 'Result' section is empty.

6. Refresh and read **Log** and wait for **Result**. See successful run example below:

The screenshot shows the Finmars PMS interface with the 'Excel Import' workflow completed. The 'Run' button is highlighted, and the 'Log' section shows the successful completion of the workflow. The 'Result' section displays the final output.

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