

# Investment Weighted Return

All details are input in Light Blue boxes

1. Input date and amount of initial investment

2. Input valuation date and current value of investment

3. Select number of transactions;  
 • Up to 15  
 • 16-30  
 • 31-45  
 • 45-60

4. Input date and amounts of any withdrawals or deposits that occurred during the period being measured.

5. Input the expected rate of MWR.  
 The calculator does NOT automatically calculate the MWR, it is currently on a 'trial & error' basis.

The rate of MWR will be when the value in the green box equals or is near to the current value that was Previously input above.

6. Select whether Time Weight Return required.  
 If Yes, TWR page will appear

Client's name	John Smith			
Initial investment:	Day 1	Month 1	Year 2022	Amount 10,000
Current value:	1	1	2025	8,612
Transactions:	Up to 15			
Input in chronological order				
	1	1	2023	Additional 2,000
	1	1	2024	Withdrawal 5,000
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
	1	1	2025	Additional 0
Adjust MWR input by "trial and error" so that amount shown equals current value				
Money Weighted Return per annum			5.25%	£8,612
Calculate Time Weighted Return?			Yes	Input details on TVWR tab

# Investment Weighted Return Time Weighted Return

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Most of the information on this page is from inputs on MWR page

1. Input value at date of transactions

Shows TWR per annum

	Day	Month	Year		Amount
Initial investment:	1	1	2022		£10,000
Current value:	1	1	2025		£8,612

  

Transactions:	Up to 15					
	Input in chronological order			Value at date		
	1	1	2023	10,500	Additional	£2,000
	1	1	2024	13,000	Withdrawal	£5,000
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0
	1	1	2025	0	Additional	£0

  

Time Weighted Return per annum	5.54%
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