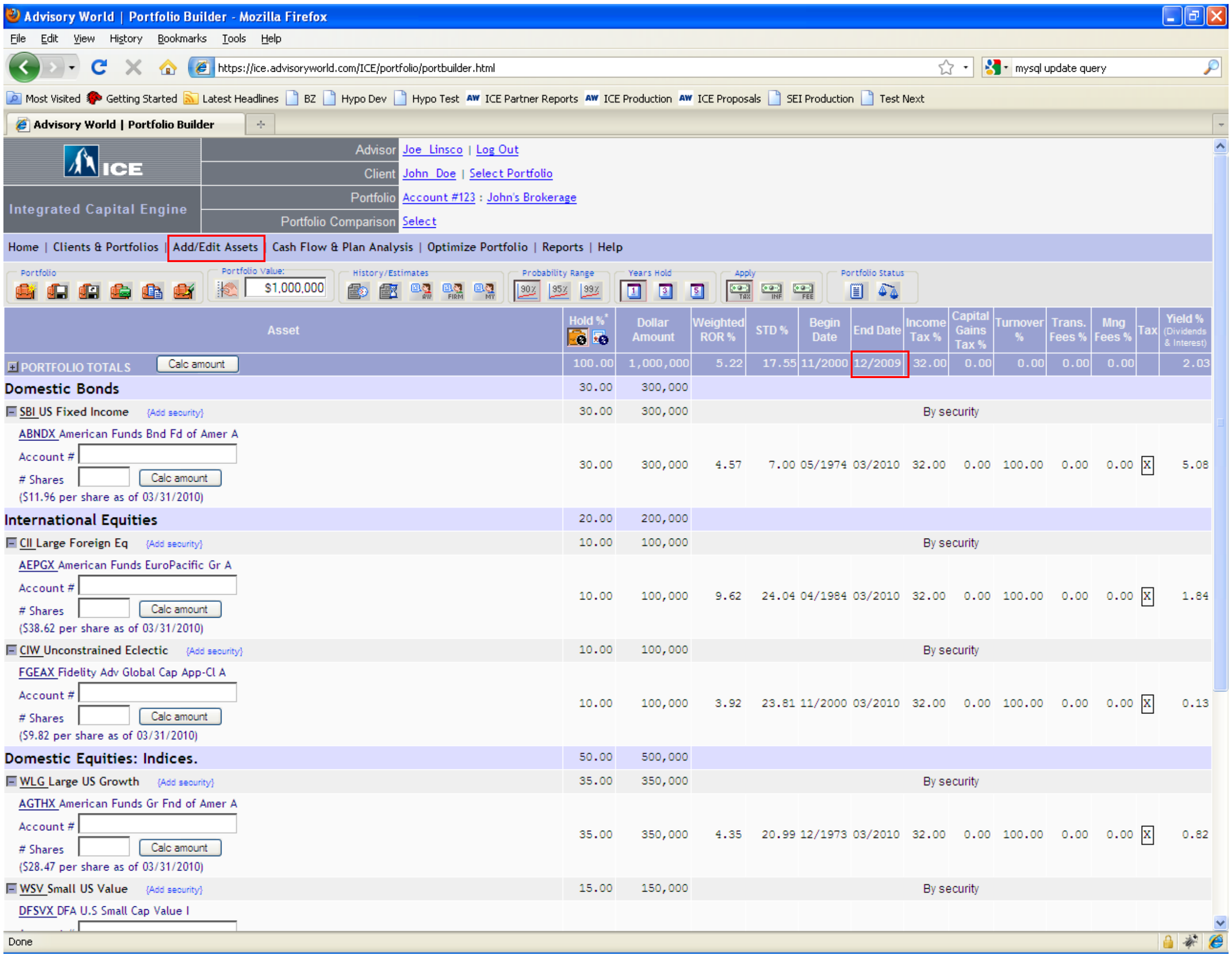
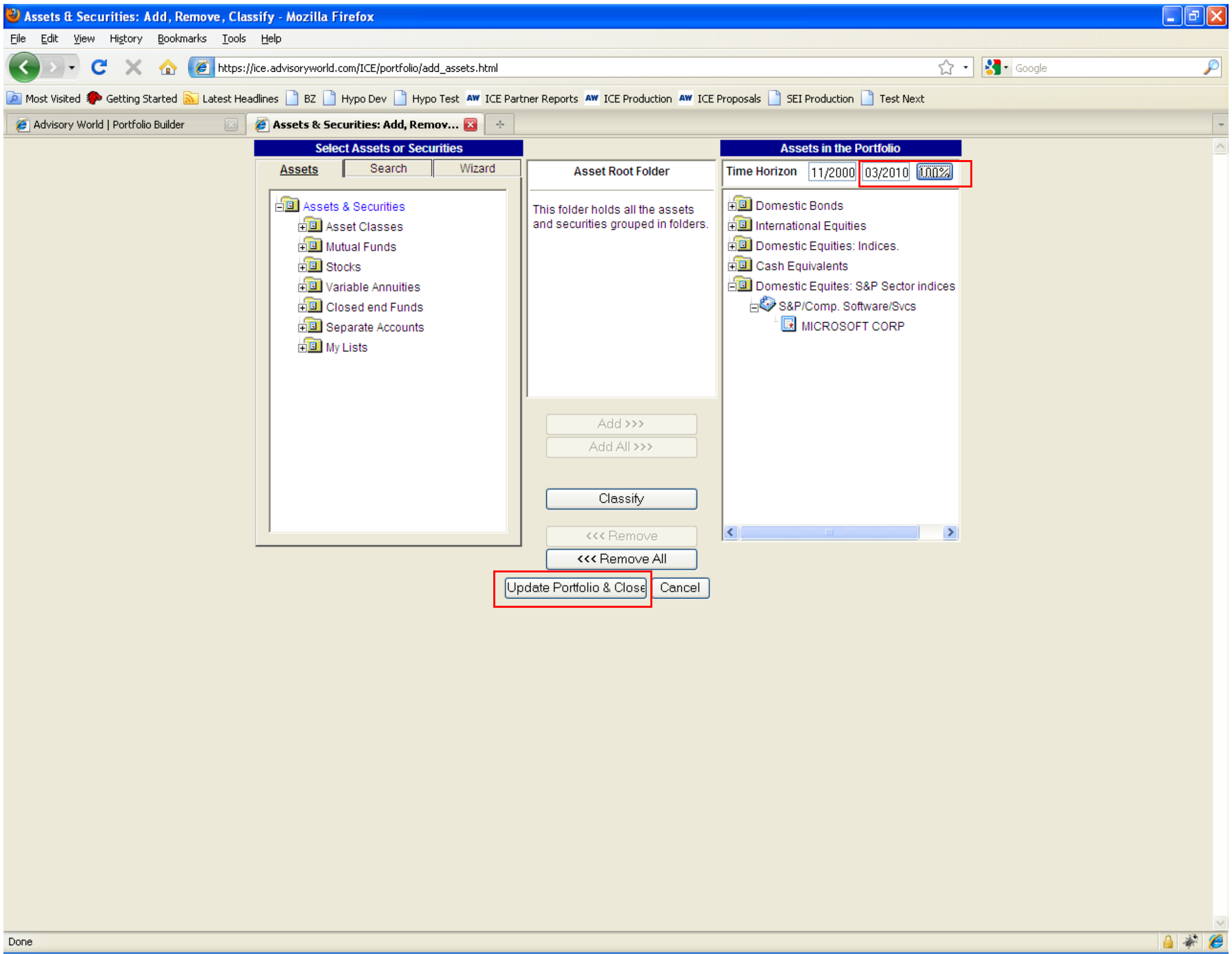
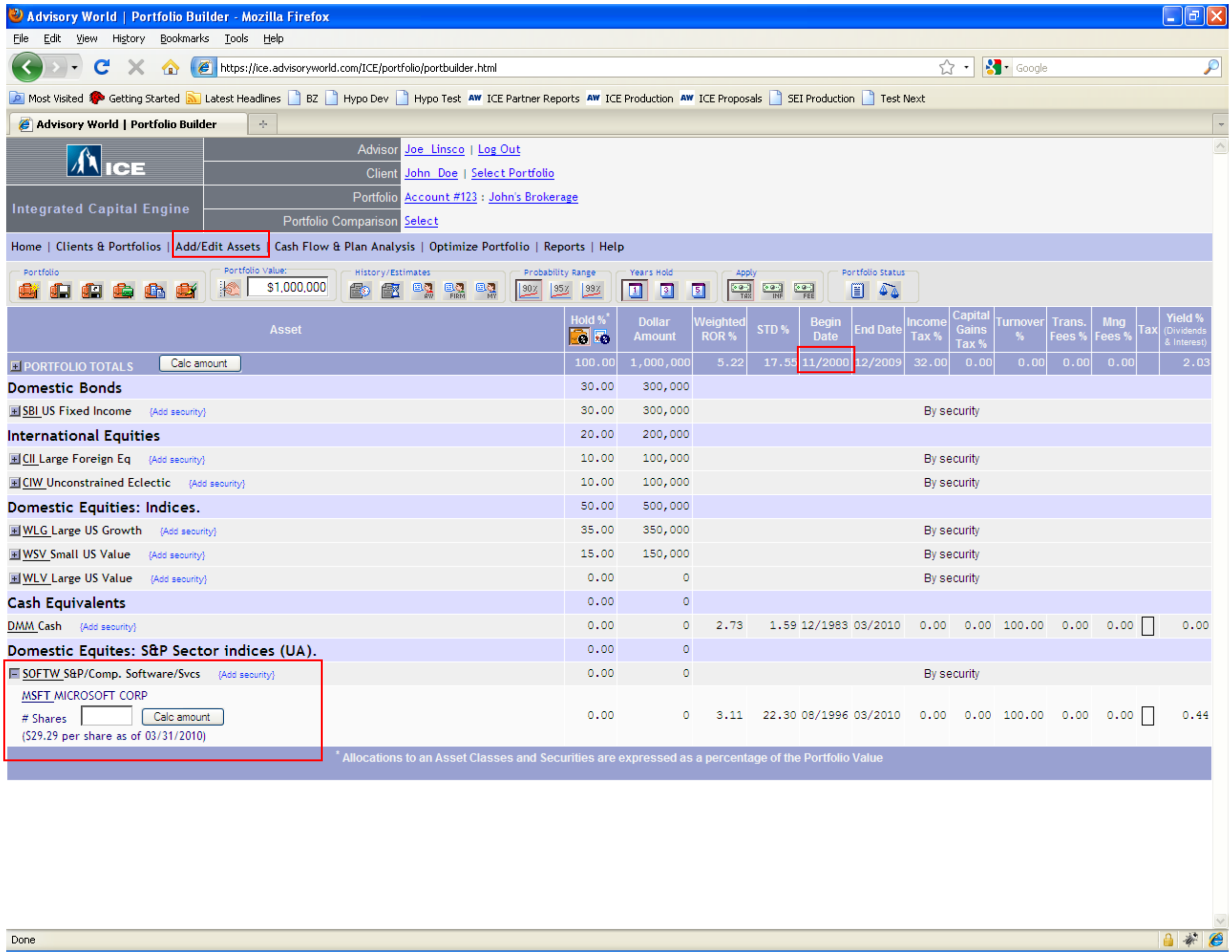


Notice that this portfolio has an end date of 12/2009…

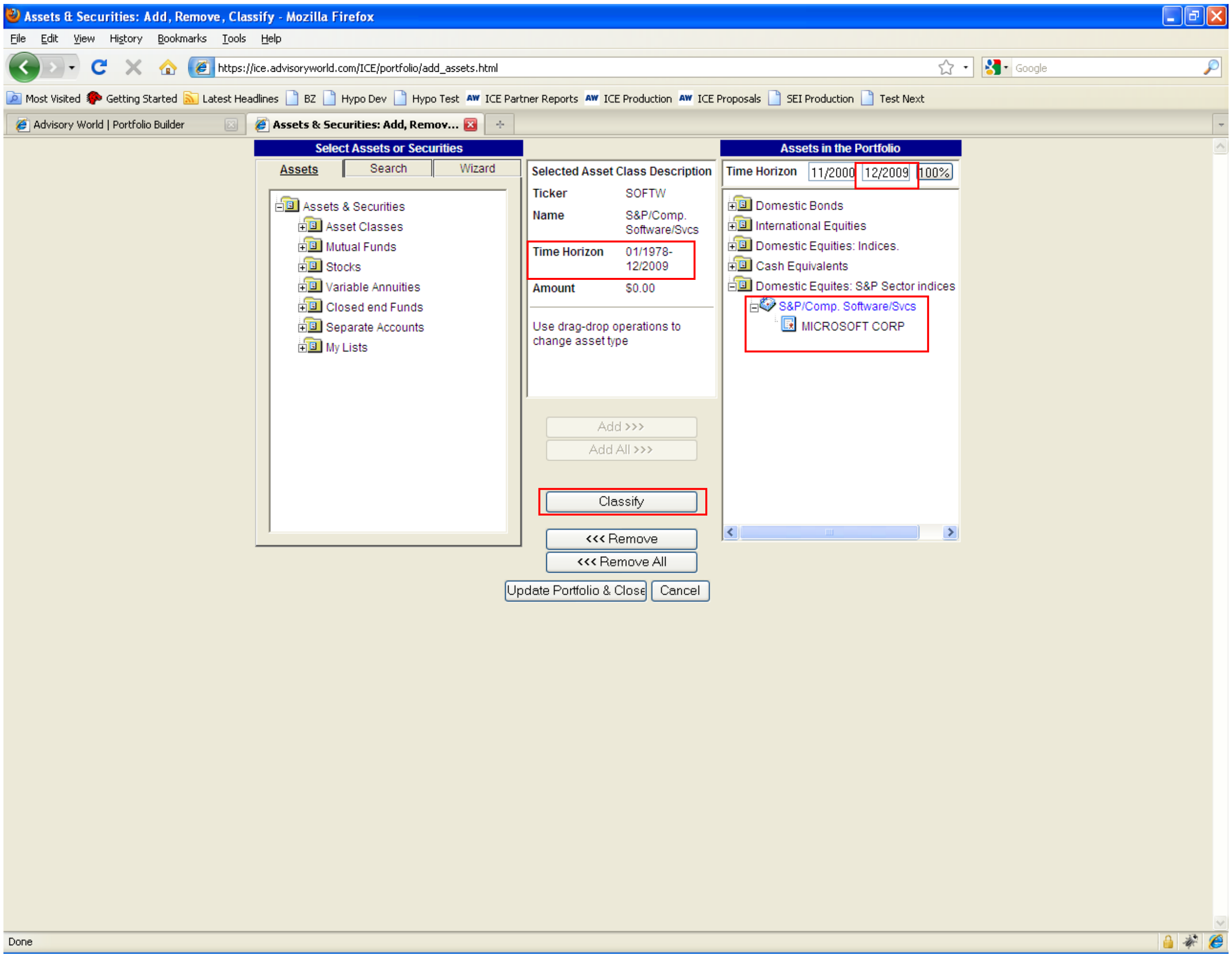
Click Add/Edit Assets



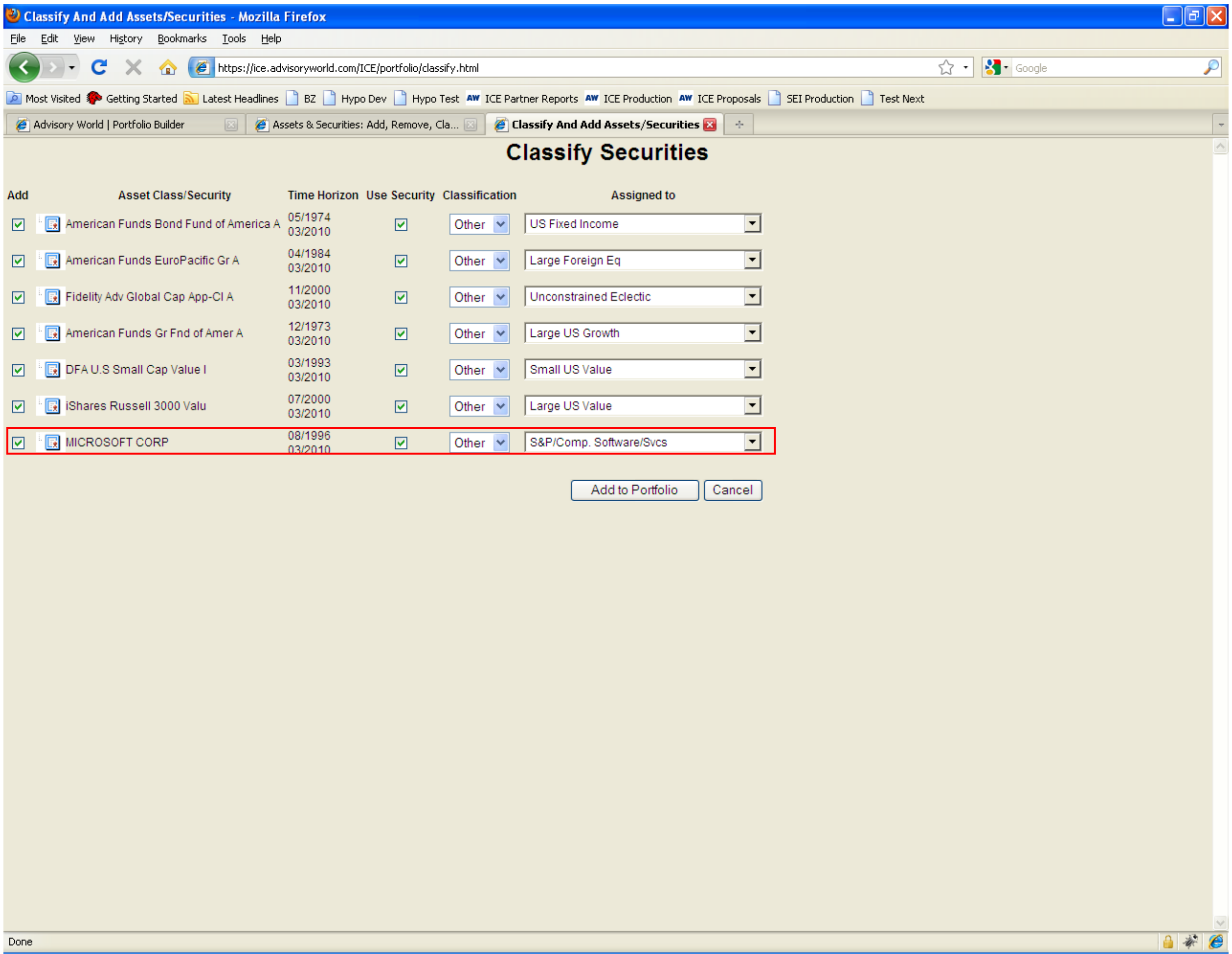
If I press 100% the Horizon lists 03/2010 as the end date, Press Update Portfolio and Close…



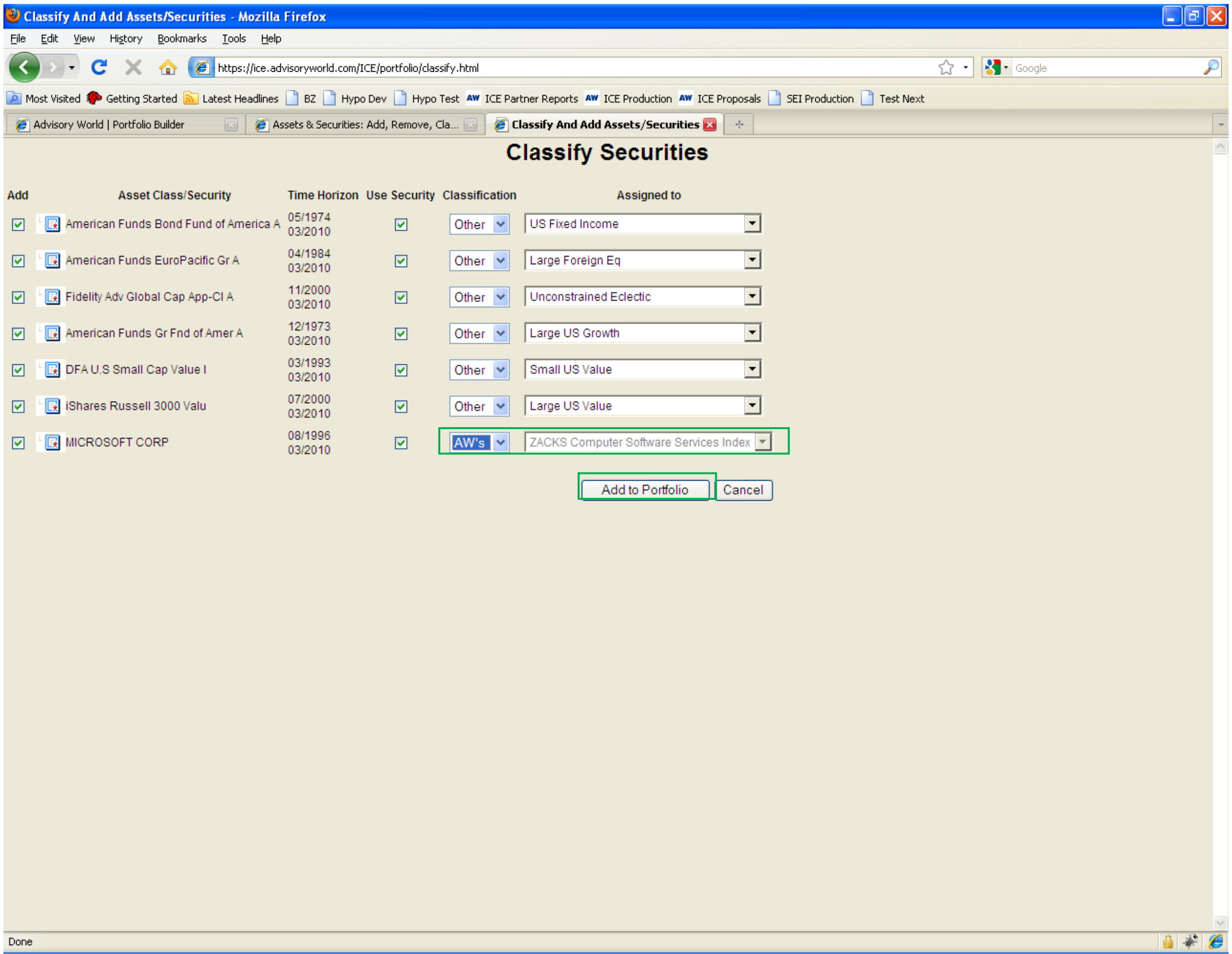
The end date still displays 12/2009… Click Add/Edit Assets again



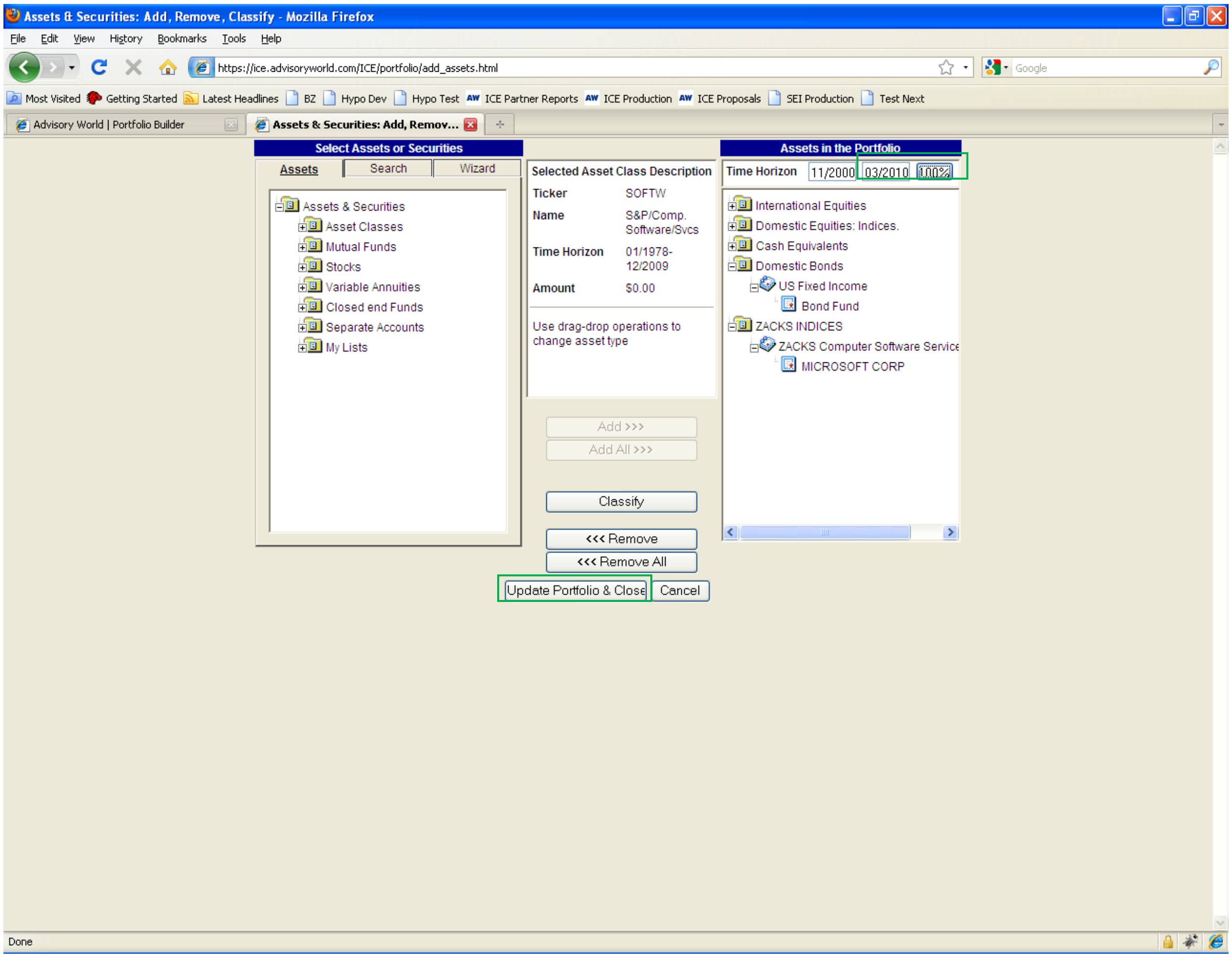
The reason for this is because the discontinued performance history for the S&P Industry Indices is limited to 12/2009. Press Classify.



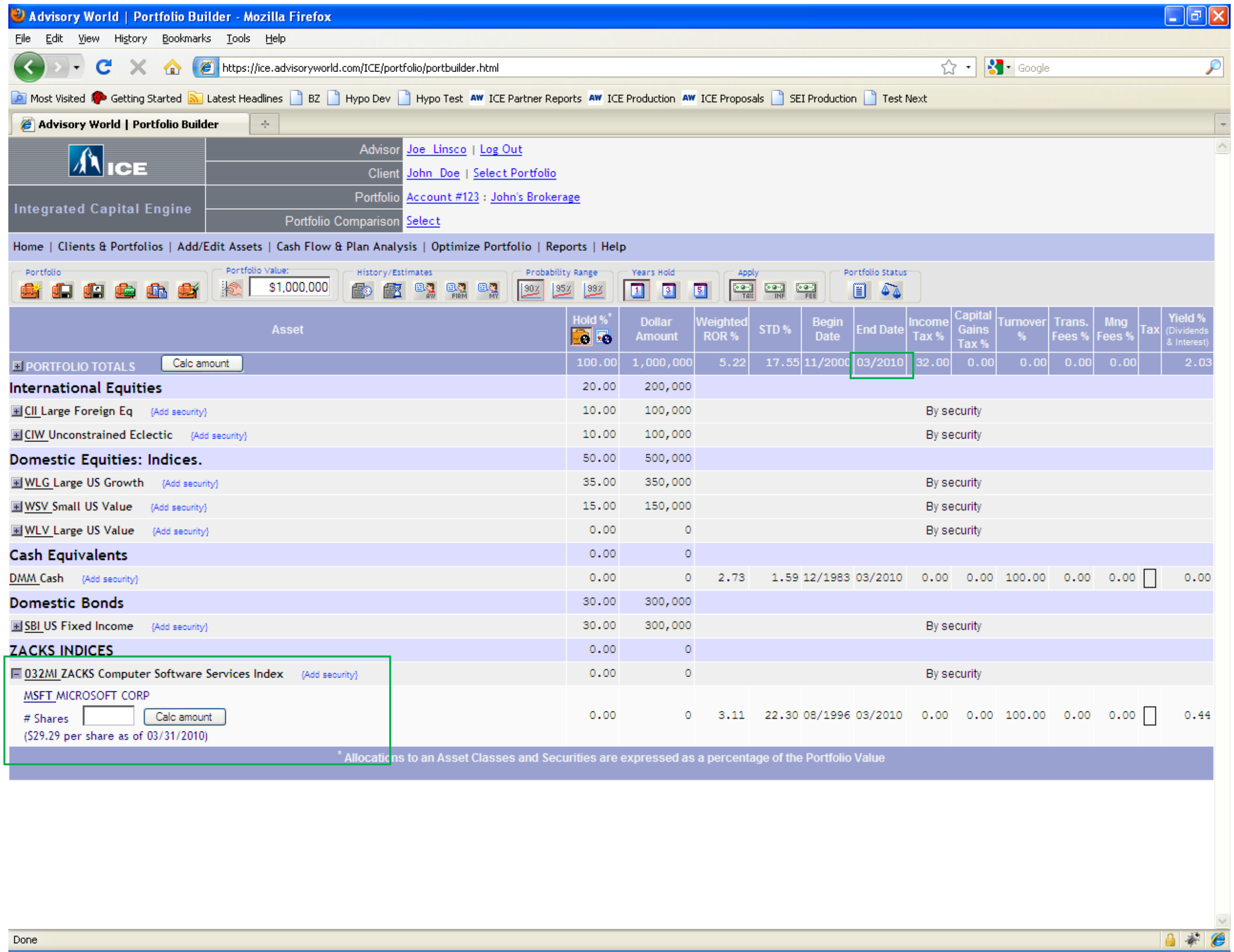
Notice the Stock in this portfolio (MSFT) is using the S&P/Comp. Software/Svcs Index…



Simply switch from “Other” to “AW” (notice that a ZACKS index is replaced) then press Add to Portfolio…



Press 100% then Update Portfolio & Close…



Portfolio is now updated through 3/2010.

PLEASE NOTE THAT THIS WILL ONLY AFFECT PRE-EXISTING PORTFOLIOS WITH STOCK POSITIONS AS NEW PORTFOLIOS WITH STOCK POSITIONS WILL AUTOMATICALLY DEFAULT TO THE NEW ZACKS INDICES.