

Investment Pathways

Last Modified on 24/11/2023 11:54 am GMT

The Investment Pathways tab contains the Central Investment Proposition, view Discretionary Fund Managers, Multi-Asset, Model Portfolios, Insurance Distribution Directives and Bespoke Portfolios:

The screenshot displays the Synaptic Pathways application interface. At the top, there is a navigation bar with the Synaptic Pathways logo and various menu items including Home, ParaPlanner Access Centre, Contacts, Research, Portfolio Builder, Investment Pathways (highlighted), Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, Aegon Platform, and More. A search bar is also present.

The main content area is divided into four sections:

- Central Investment Proposition:** A table listing various investment propositions. The columns are Name, Description, Active, Last Modified, and Owner. The first row is "Central Investment Proposition Sep23" with a description of "Test CIP".
- Discretionary Fund Managers:** A table listing fund managers. The columns are Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date. The first row is "7IM Active Adventurous Model Portfolio" with a promoter of "Seven Investment Management (Risk)".
- Multi-asset:** A table listing multi-asset portfolios. The columns are Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date. The first row is "7IM AAP Adventurous C Acc" with a promoter of "Seven Investment Management (Risk)".
- Insurance Distribution Directive:** A table listing insurance distribution directives. The columns are Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date. The first row is "Aviva Smooth Managed 2 Fund" with a promoter of "Aviva (Risk)".

Portfolio Builder									
Model Portfolios									
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	Search by Name or Range Q Search this list...	
1	Amy Test Portfolio 0709	Yes	2	Moderately Cautious	Private	13/09/2023, 11:35	Valid		
2	asset base - Balanced	Yes	3	Balanced	Public	16/12/2022, 08:55	Valid		
3	Aviva Query	Yes	4	Moderately Adventurous	Private	29/06/2023, 10:13	Valid		
4	BCR ADV Q4 2022	Yes	4	Moderately Adventurous	Private	19/10/2022, 11:07	Valid		
5	BFB9	Yes	3	Balanced	Private	08/12/2022, 16:44	Valid		
6	Brendan portfolio	Yes	4	Moderately Adventurous	Private	05/09/2022, 15:21	Valid		
7	Brendan	Yes	6	Moderately Adventurous	Private	10/11/2022, 09:20	Valid		

Portfolio Builder									
Bespoke Portfolios									
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	Search by Name or Range Q Search this list...	
1	10fz	Yes	4	Moderately Adventurous	Private	08/07/2022, 11:59	Valid		
2	13a1	Yes	2	Moderately Cautious	Private	01/11/2023, 09:58	Valid		
3	75 Demo	Yes	3	Balanced	Private	25/10/2022, 15:22	Valid		
4	7IM AAP Adventurous C Acc	Yes	4	Moderately Adventurous	Private	12/04/2023, 10:46	Valid		
5	7im portfolio	Yes	4	Moderately Adventurous	Private	10/08/2022, 16:18	Valid		
6	AA Based	Yes	2	Moderately Cautious	Private	16/08/2022, 10:39	Valid		
7	AA Based	Yes	2	Moderately Cautious	Private	16/08/2022, 10:39	Valid		

Portfolio Builder									
In-House Discretionary Portfolios									
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	Search by Name or Range Q Search this list...	
1	AA Based	Yes	3	Balanced	Public	14/09/2022, 12:23	Valid		
2	AA Based	Yes	2	Moderately Cautious	Private	28/07/2022, 13:27	Valid		
3	AA Based	Yes	3	Balanced	Private	25/08/2022, 13:24	Requires Attention		
4	AA Based	Yes	3	Balanced	Private	20/07/2022, 13:45	Valid		
5	AA Based	Yes	3	Balanced	Private	04/10/2022, 12:07	Requires Attention		
6	AA Based	Yes	4	Moderately Adventurous	Private	18/08/2022, 12:45	Valid		
7	AA Based	Yes	2	Moderately Cautious	Private	16/08/2022, 10:39	Valid		

For further information about this area, please see the following articles:

[Investment Pathways](#)

[Investment Pathways - Discretionary Fund Managers, Multi-Asset & Insurance Distribution Directives](#)

[Investment Pathways - Model & Bespoke Portfolios](#)