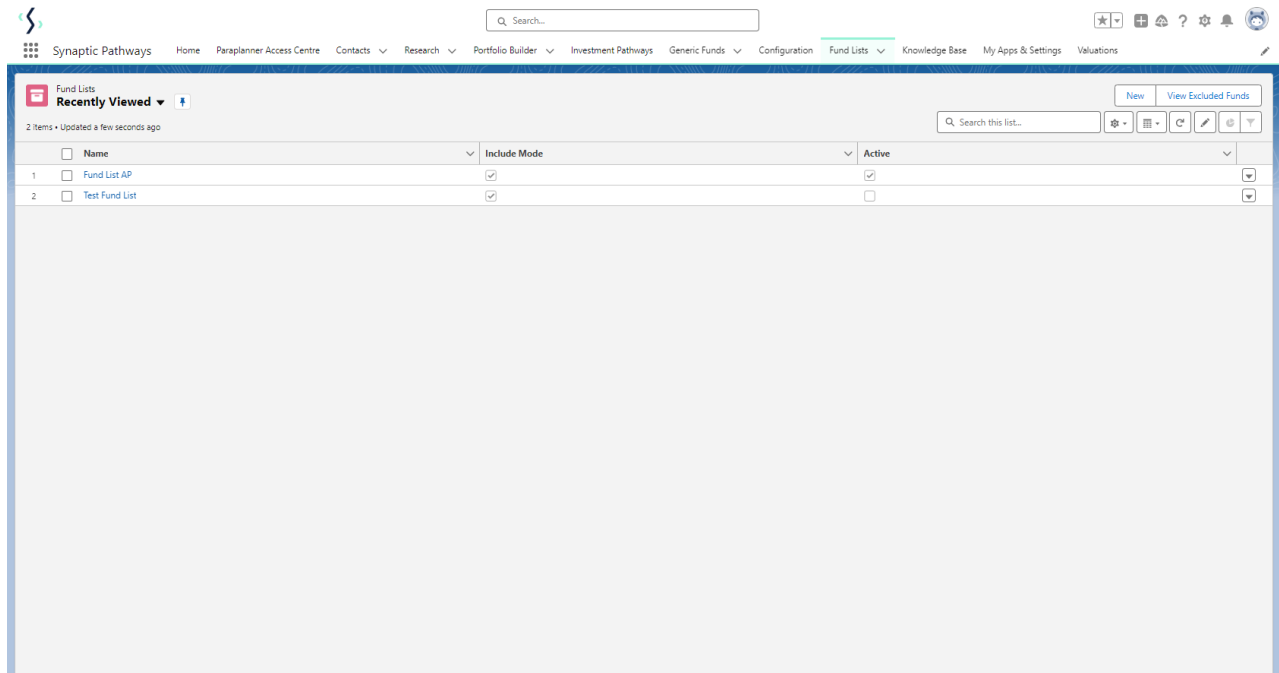


# Fund Lists

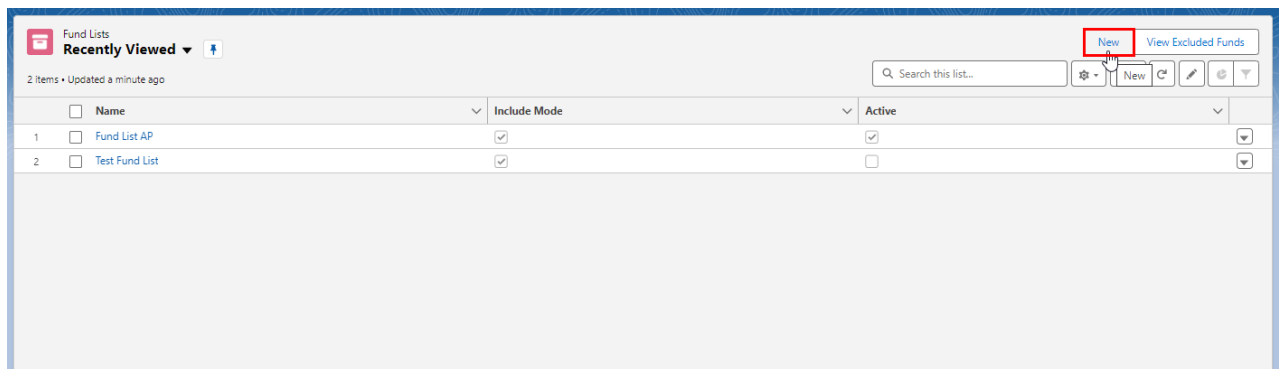
Last Modified on 27/11/2023 11:12 am GMT

The Fund Lists tab allows you to create one or more fund lists.

Multiple Fund Lists can be active at one time and can be used on Central Investment Propositions.



Create new Fund Lists through the New button:



You can set the Fund List as Active upfront, or choose to deselect the tick box until you are ready to enable:

## New Fund List: Include

\* = Required Information

**Information**

\* Name ↶

Fund List Test 3

Active

Cancel Save & New Save

Q Search...

★
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Synaptic Pathways
Home
Paraplanner Access Centre
Contacts
Research
Portfolio Builder
Investment Pathways
Generic Funds
Configuration
Fund Lists
Knowledge Base
More

Fund List
Fund List Test 3

✔ Fund List Fund List Test 3 was created.

Edit Fund Import Export Fund List

Fund List

Fund Code

Name ↑

Promoter

Sector

Type

Locked Share Class

**Fund Search**

Enter Fund Code or Name

Whole of Market  Parent Only  Generic Funds

Use the textbox above to search for fund by name or by fund code (Citicode, SEDOL, ISIN and Mexid are available in search where supported by the provider)

Fund Code	Name ↑	Promoter	Sector	Type	Locked Share Class

Add funds to your Fund List by typing in the fund name or fund code (Citicode, Sedol, ISIN and MexID)

Tick Whole of Market to search all funds in the database, Parent Only if you would like the search to return Parent only funds. Generic Funds will return funds you have created in the system.


**Fund Search**

Enter Fund Code or Name

Q Search

Whole of Market   
  Parent Only   
  Generic Funds

Use the textbox above to search for fund by name or by fund code (Citicode, SEDOL, ISIN and MexId are available in search where supported by the provider)



**Fund Search**

Enter Fund Code or Name

Q Search

Whole of Market   
  Parent Only   
  Generic Funds

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**Fidelity Global Special Situations A Acc**

Fidelity International (FIL In • Equity - Internati

Fund List **Fund List Test 3**
Edit Fund Import Export Fund List

**Fund Search**

Enter Fund Code or Name

Q Search

Whole of Market   
  Parent Only   
  Generic Funds

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**Fidelity Global Special Situations A Acc**

Fidelity International (FIL In • Equity - Internati

	Fund Code	Name ↑	Promoter	Sector	Type	Locked Share Class
X	E184	Fidelity Global Special Situatio	Fidelity International (FIL In	Equity - International	Child	🔒

See next: [Fund Lists - Exclude Funds](#)