

Investment Pathways - Model, Bespoke & In-House Discretionary Portfolios

Last Modified on 19/02/2024 6:27 pm GMT

You can create/view portfolios within **Portfolio Builder** (As seen in article [Portfolio Builder - Creating a Portfolio](#)) or within **Investment Pathways**.

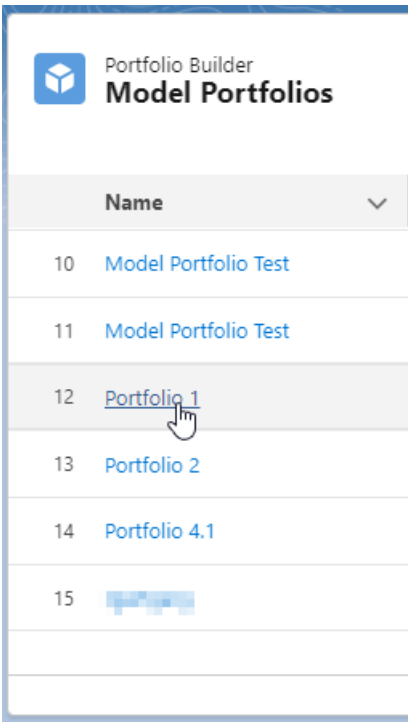
This article will take you through the **Investment Pathways** area.

Portfolio Builder Model Portfolios								
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1	Adventurous	Yes	6	Balanced (High End)		Private	11/02/2022, 15:46	Valid
2	Another Example	Yes	7	Moderately Adventurous (Lo...		Private	22/03/2022, 10:33	Valid
3	Blake	Yes	8	Moderately Adventurous (Hig...		Private	16/12/2021, 14:01	Valid
4	CIP 2	Yes	7	Moderately Adventurous (Lo...		Private	01/04/2022, 15:57	Valid
5	CIP 2 - 2022	Yes				Private	01/04/2022, 15:58	Requires Attention
6	David	Yes	8	Moderately Adventurous (Hig...		Private	10/02/2022, 14:23	Valid

Portfolio Builder Bespoke Portfolios								
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1	11212	Yes	7	Moderately Adventurous (Lo...		Private	09/12/2021, 11:40	Valid
2	AA Portfolio	Yes				Private	20/04/2022, 12:34	Valid
3	AC Demo	Yes	8	Moderately Adventurous (Hig...		Private	02/03/2022, 11:42	Valid
4	AH Demo	Yes	7	Moderately Adventurous (Lo...		Private	22/03/2022, 15:16	Valid
5	Alex	Yes	7	Moderately Adventurous (Lo...		Private	22/11/2021, 13:08	Valid
6	Andy 2	Yes	9	Adventurous		Private	19/10/2021, 10:58	Valid

Portfolio Builder In-House Discretionary Portfolios								
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1	Amy's IHDFM	Yes	5	Balanced (Low End)		Public	29/03/2022, 15:20	Valid
2	CIP Balanced	Yes	5	Balanced (Low End)	Balanced	Private	21/04/2022, 15:39	Valid
3	IHD - Portfolio 1	Yes	6	Balanced (High End)		Private	21/03/2022, 09:17	Valid
4	IHD Test Portfolio	Yes	7	Moderately Adventurous (Lo...		Private	31/03/2022, 16:10	Valid
5	MH Test IHD	Yes	6	Balanced (High End)		Private	05/05/2022, 10:56	Valid
6	My INHDM	Yes	5	Balanced (Low End)		Private	19/04/2022, 15:56	Valid

Click into the portfolio to view details:



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Portfolio 1 Duplicate Portfolio Import Funds Edit

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Fund Search

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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 Table

Fund Code	Fund Name	Promoter	Asset Allocation	Weighting %
GMUI	Fidelity Global Property W Acc	Fidelity International (FIL In	<input checked="" type="checkbox"/>	50
DAZ7	Royal London UK All Share Tracker Z Acc	Royal London Unit Tst Mgrs	<input checked="" type="checkbox"/>	50
			Cash	0

Remaining allocation: 0%
Total allocation: 100%

Portfolio Summary

Risk Profile Category: Moderately Adventurous (Low End) Risk Rating: 7

Minimum Gain in any 1 Year: -18.09% or -£1,809.00

Average Gain in any 1 Year: 3.69% or £369.00

Maximum Gain in any 1 Year: 22.96% or £2,296.00

The bar chart displays the minimum, mean and maximum gain values as a percentage for the portfolio.

About the Fund Search

The Fund Universe is sourced from FE fundinfo Limited and from a range of Fund Promoters who have authorised Synaptic Software Limited to distribute.

FE fundinfo information in this service is updated on a daily basis.

Use of SEDOL Masterfile®, if you search for funds based on

For further information on creating a portfolio, see article [Portfolio Builder - Creating a Portfolio](#).