Can I duplicate a portfolio?

Last Modified on 23/04/2024 11:47 am BST

You will need to open the portfolio you would like to duplicate:

Portfolio Builder All Fitered by All portfolio builder • Updated				
	Name 1	\sim		
1	Import Test 1			
2	Model Test Portfolio			
3	Model Test Po Model Test Portfolio			
4	Dortfolio Tort 1			

Click 'Duplicate Portfolio' in the top right corner:

Synaptic Pathways Home Paraplanner Access Centre C	ontacts 🗸 Research 🗸	Q Search. Portfolio Builde		ys Generic Funds 🗸	Configuration F	'und Lists ∨ Knowled	ige Base My Apps & Settings Valuations 🗸 🖉
Portfolio Import Funds Edit Amy Test Portfolio 0709 Uplicate Portfolio Import Funds							
📃 Details 🔥 Portfolio Builder 👰 Compliance 🗐 Ρ	ortfolio Factsheet						
Fund Search	Fund Table					Find Weightings	Portfolio Summary
Enter Fund Code or Name Q Fund Code or Name Q Search	6 Code	Shareclass Lock	Name	Promoter	Asset Allocation	Weighting %	Risk Profile Category Risk Rating Balanced 3.6
Advanced Search	× BFB9	6	7IM AAP Adventurous C Acc	7IM Investment Funds	<u> </u>	33.33	Minimum Gain in any 1 Year -14.9% or -£1,490.00
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)	× ACDQ .	6	Vanguard LifeStrategy 60% Equity A Shares Acc	Vanguard Investments UK Limite	<u> </u>	33.34	Average Gain in any 1 Year 7.01% or £701.00
	× ACDO 👰	6	Vanguard LifeStrategy 40% Equity A Shares Acc	Vanguard Investments UK Limite	<u> </u>	33.33	Maximum Gain in any 1 Year 27.42% or £2,742.00
				F	Cash Remaining allocation:	0	The bar chart displays the minimum, mean and maximum gain values as a percentage for the portfolio.
					Total allocation:	100%	Min.
About the Fund Search							Avg.
The Fund Universe is sourced from FE fundinfo Limited and from a range of Fund Promoters who have authorised Synaptic Software Limited to distribute.							Max.
FE fundinfo information in this service is updated on a daily basis.							-30 -20 -10 0 10 20 30 Gain
Use of SEDOL Masterfile ©, if you search for funds based on the London Stock Exchange SEDOL code you are stipulating by doing so that you have obtained the relevant license and if required can							
provide verification.							Asset class weightings for the portfolio as a percentage 39.31% - Global Equities (ex. UK)
							22 8787 Global Dande (av 114)

Complete the details of the new portfolio and 'Save'

alo		
	Duplicate Portfolio	
* Portfollo Name		
Model Portfollo Test	1 - Сору	
Description		
Range		
Search Ranges		Q
	Save	

If you would like to go straight into the portfolio you created, click the 'here' link in the success message:

-		110152111 2
 Image: Image: Ima	Success!	×
	Portfollo successfully duplicated. See It here.	

If not, you will remain in the original portfolio.

Navigate back to Portfolio Builder to view your duplicate portfolio:

Portfolio Builder All F 13 items • Sorted by Name • Filtered by All portfolio builder • Updated a few seconds ago				
	Name 1	✓ Risk Name One		
1	Import Test 1	Balanced		
2	Model Test Portfolio	Moderately Cautious		
3	Model Test Portfolio	Moderately Adventurous		
4	Model Test Portfolio - Copy			
5	Portfolio Test 1 Model Test P	ortfolio - Copy Adventurous		
6	Test Portfolio	Adventurous		
7	Test Portfolio 1	Moderately Adventurous		