Can I delete a portfolio?

Last Modified on 23/04/2024 11:48 am BST

You can delete the portfolio from the Portfolio screen:

	All	▼ 1										New	Import	imp	ort Porfol		Make A	venv
em	s•So	rted by Name • Filtered by All portfolio builder •	Updated 2 r	ninutes ago							Q. Search this li	ist		\$ *		C'	/ 4	C
		Name 1	~	Risk Name One	~	Availability	~	Owner Alias	~	Last Mod	fied Date	```	Reco	rd Type			~	-
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		Test Portfolio Import 3		Moderately Adventurous		Private		UUser		17/11/202	1. 11:18		Mode	l Portfoli	,			

Are you sure you want to delete this Portfolio?



You can also delete from within the portfolio:

Synaptic Pathways Home Paraplanner Access Centre	Contacts v Research V Portfolio Builder v Investment Pathways Generic Funds v Configuration Fund Lists v Knowledg	e Base My Apps & Settings Valuations						
Amy Test Portfolio 0709		Duplicate Portfolio Import Funds Edit V Deste Portfolio Change Deste Portfolio Change Deste Portfolio						
	Portfolio Factheet	Export Funds						
Fund Search	Fund Table Find Weightings	Portfolio Summary						
Enter Fund Code or Name Q. Search Q. Search	Code Shareclass Lock Name Promoter Asset Allocation Weighting %	Risk Profile Category Risk Rating Balanced 3.6						
Advanced Search	X BFB9 🙊 🔓 71M AAP Adventurous C 71M Investment Funds 🕑 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 ♀ Image: ACDQ ♀ Vanguard LifeStrategy Vanguard Investments 3334 Image: ACDQ ♀ Image: ACDQ ♀ 3334 Image: ACDQ ♀ Image: A	Average Gain in any 1 Year 7.01% or £701.00						
	X ACDO R Vanguard LifeStrategy 40% Equity A Shares Acc UK Limite 33.33	Maximum Gain in any 1 Year 27.42% or £2,742.00						
	Cath 0 0 Remaining allocation: 0% Total allocation: 100%	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		Aug.						
Limited to distribute. FE fundinfo information in this service is updated on a daily basis.		-30 -20 -10 0 10 20 30						
Use of SEDOL Masterfile 9, 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.		Cain Asset class weightings for the portfolio as a percentage						
javascript:void(0)		39.31% - Global Equities (ex UK) 73.87% - Global Ronds (ev UK)						

If you have used the portfolio against a client activity (for e.g. an Illustration) you will be presented with the following message:

This Portfolio is linked to one or more client activities



It is best to deactivate, as this will prevent the portfolio being used but will allow the portfolio to stay linked to client activities.

If you choose to delete the portfolio, you will be prompted to select an alternative portfolio next time the client activity is reviewed.