I have created a Central Investment Proposition, but I cannot see it's reflected in the research?

16/06/2025 3:46 pm BST

You will need to make sure the Central Investment Proposition is set to active.

Navigate to Investment Pathways:



In the Central Investment Proposition area, find the record you have created.

If the Active column shows the CIP as Inactive, you will need to activate this for it to be reflected in the research.

Central Investment Proposition								New
Name ↓	~	Description	Active	~	Last Modified	~	Owner	~
AND ADD OF SUBJECT AND		Test CIP	No		20/09/2023. 09:46		They find out	(
			No		06/10/2023, 14:44		THE OWNER OF	(
Fest CIP		Test CIP Description	No N		18/10/2023, 12:51		10.000	(
NAV THE			No 48		04/10/2022, 13:53		10.000	(
			No		17/12/2022, 02:24		inter linear	(
lanar atilan		Association (1)	No		24/03/2023, 02:25		and the second sec	
No. 10		The second structure as an inclusion of the second structure of	No		24/03/2023. 02:25		The second se	
98			No		24/03/2023, 02:25		1. TO 1.	
			No		25/07/2022, 12:47		in here	

On the right side of the record, click into the dropdown arrow:

Central Investment Proposition					New
Name ↓	✓ Description	✓ Active	✓ Last Modified	✓ Owner	~
Central Investment Proposition Sep23	Test CIP	No	20/09/2023, 09:46	Amy Paulsen	
P1 test		No	06/10/2023, 14:44	Ellen Ashcroft	v
Test CIP	Test CIP Description	No	18/10/2023, 12:51	Amy Paulsen	
Sebs Test		No	04/10/2022, 13:53	Seb Marshall	Edit (http:
abrdn 🛕		No	17/12/2022. 02:24	John Warby	Delete
Commodore	Commodore CIP	No	24/03/2023, 02:25	John Warby	
Test CIP	This is a test CIP, please do not delete - I will set it to inactive	wh No	24/03/2023, 02:25	Rahul Gupta	v
Test		No	24/03/2023, 02:25	Stu Home	
Trial		No	25/07/2022, 12:47	Ami Thakar	

tick the Mark Active box:

· ·	Active	~	Last Modified		×
	New Central Investm	nent Propositio	n(CIP)		
CIP Name					
CI Test CIP					
CIP Description					
Test <u>CIP</u> Description					
Mark Active					
				Cancel	ave

Save:

Edit Central Investment Proposition(CIP)	012 12:02
*CIP Name	
Test CIP	
CIP Description	
Test CIP Description	
Mark Active	
	Cancel Save

Once saved, a success message will appear:



When creating your research, you will either be able to select your chosen segment or you will see the segment in the summary bar at the top of the screen:

Choose							
Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds.							
* Choose Segment							
Test Segment 1		-	Use Whole of Market				
✓ Test Segment 1 Segment CIP 2	Ţm.		Disabl	ed			
				Save			
		1117 - 113X8-114	THE MELLAN	l .			
Research Test Client Illustration							
Client Test Client	Description	Illustration Type Segment	Segment Name Test Segment 1				

Please note - It is worth making sure your segment names are unique to the CIP, if you have multiple CIPs with similar segments, you may not be able to differentiate between them