Creating a Central Investment Proposition

Last Modified on 24/11/2023 12:03 pm GMT

Central Investment Proposition allows you to set what on & off platform products will be available to research, as well as portfolios, fund lists and segments.

They are created within the Investment Pathways tab:



Click New under Central Investment Proposition

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Enter the **CIP Name** & **CIP Description**. If you would like the CIP active upfront, tick **Active** (You will need to complete setup of the CIP before conducting research). The CIP can be made active after setup.

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To start entering details into the CIP, see article Central Investment Proposition - Adding On Platform Products