

# Central Investment Proposition - Adding Portfolios to a Segment

Last Modified on 12/05/2022 12:38 pm BST

This article is a continuation of [Central Investment Proposition - Adding Off Platforms to a Segment](#)

To add Portfolios to a Segment within the Central Investment Proposition click into **Portfolios**

The screenshot shows the 'Segment Details - Segment 1 Test' interface. At the top, there are navigation tabs: 'Platforms', 'Off Platform Products', 'Portfolios', and 'Fund L'. The 'Portfolios' tab is highlighted with a mouse cursor. Below the tabs, there is a blue button labeled 'Add / Remove Portfolios in the CIP from the Segment'. The main content area is divided into two columns. The left column contains a card for 'Segment 1 Test' with details like 'Investor Type: Retail' and 'Knowledge & Experience: Basic Investor'. The right column contains a section titled 'What's shown here' with instructions: 'Select which Portfolios should be included in the Segment. Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-post reviews.' Below this, there are two lists: 'Portfolios Available in CIP' and 'Portfolios in Segment'. The 'Portfolios Available in CIP' list currently contains 'AJ Bell Active MPS 2'. The 'Portfolios in Segment' list is empty.

Move one or more portfolios by clicking on the portfolios you would like to add to the segment.

Once selected, click the arrow to move the portfolio over to **Portfolios in Segment**

This screenshot shows the 'Segment Details - Segment 1 Test' interface with the 'Portfolios' tab selected. The main content area is divided into two columns. The left column contains a card for 'Segment 1 Test' with details like 'Investor Type: Retail' and 'Knowledge & Experience: Basic Investor'. The right column contains a section titled 'What's shown here' with instructions: 'Select which Portfolios should be included in the Segment. Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.' Below this, there are two lists: 'Portfolios Available in CIP' and 'Portfolios in Segment'. The 'Portfolios Available in CIP' list contains several items: 'AAP Balanced S Acc', 'AJ Bell Active MPS 2', 'Balanced Index', 'Balanced Passive+', and 'BNY Mellon Sustainable Global Equity Income Fund'. A mouse cursor is hovering over 'AJ Bell Active MPS 2'. The 'Portfolios in Segment' list is empty.

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

**What's shown here**

Select which Portfolios should be included in the Segment.  
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

**Add / Remove Portfolios in the CIP from the Segment**

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

Move selection to Portfolios in Segment

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

**What's shown here**

Select which Portfolios should be included in the Segment.  
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

**Add / Remove Portfolios in the CIP from the Segment**

Portfolios Available in CIP

- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

- AAP Balanced S Acc

Multiple portfolios can be moved at once. Click on the first portfolio, type CTRL A to select all the portfolios in the list.

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

**What's shown here**

Select which Portfolios should be included in the Segment.  
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

**Add / Remove Portfolios in the CIP from the Segment**

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

If you don't wish to move all portfolios, click the first portfolio, hold CTRL and click the remaining portfolios you would like to move.

What's shown here

Select which Portfolios should be included in the Segment.  
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

Move selection to Portfolios in Segment

Once done, move onto [Central Investment Proposition - Adding Fund Lists to a Segment](#)