

Risk Rate Holding

Last Modified on 21/09/2023 10:21 am BST

This article is a continuation of [Off-Platform Holdings - Performance](#)

Risk rate a holding through the **Risk Rate Holding** button at the top right of the screen:

The screenshot shows the 'Collective SIPP' holding page. At the top right, there are buttons for 'Risk Rate Holding', 'Review', 'Edit', and 'Delete'. The 'Risk Rate Holding' button is highlighted with a mouse cursor. Below the buttons, the client information is displayed: Client: Test Client, Current Value: £137,717.36, Current Risk Rating. The main content area has tabs for 'Details', 'Underlying Assets', 'Cash Accounts', 'Assets', 'Performance', 'Charges', and 'History'. The 'Details' tab is active, showing a table with fields like Name, Description, Start Date, End Date, etc. To the right, there is a 'Weighting By Funds' donut chart showing 100.00% in Vanguard LifeStrategy 40% Equity A Shares Acc. Below the chart is a 'Performance Chart' showing a sum of value over time.

The screenshot shows a modal dialog box with the text 'Calculating risk rating.' and a loading spinner. The dialog box is centered on the screen and has a close button in the top right corner.

The screenshot shows a green success message banner with a checkmark icon and the text 'Success! Risk rating calculated successfully!'. There is a close button in the top right corner.

Once risk rated, the rating can be found next to the current value at the top of the screen:

The screenshot shows the top section of the 'Collective SIPP' holding page. The client information is displayed: Client: Test Client, Current Value: £137,717.36, Current Risk Rating: 4 | Moderately Cautious (High End).

For further information on Holdings, see article [Creating a Platform Holding](#)