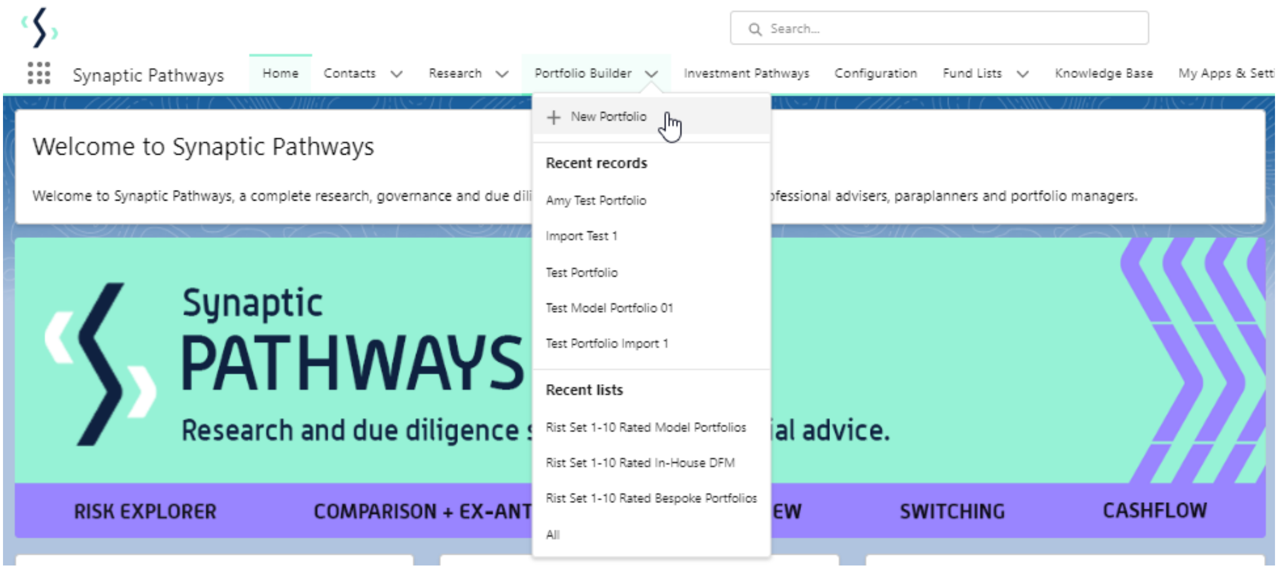
In-House Discretionary - Create a Portfolio

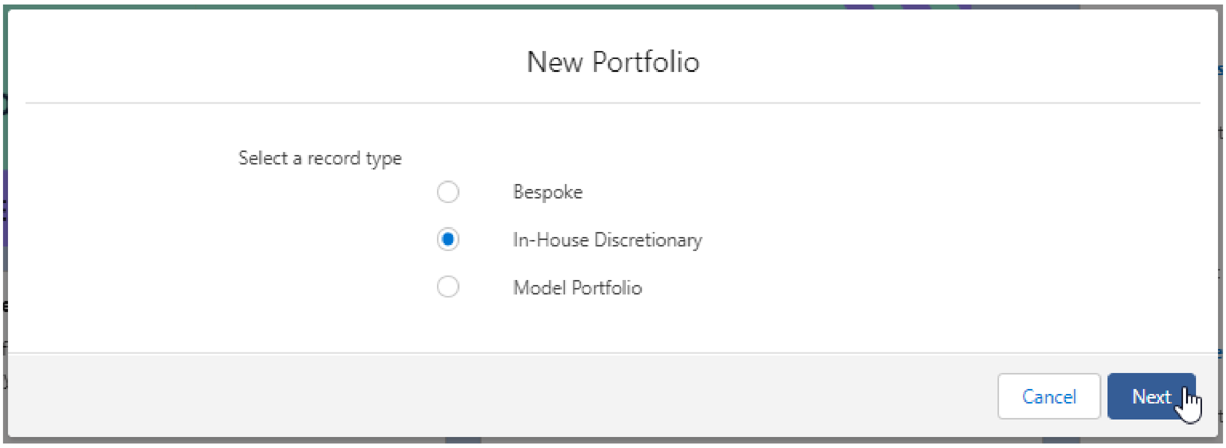
Last Modified on 23/04/2024 11:34 am BST

Create In-House Discretionary portfolios under the Portfolio Builder tab.

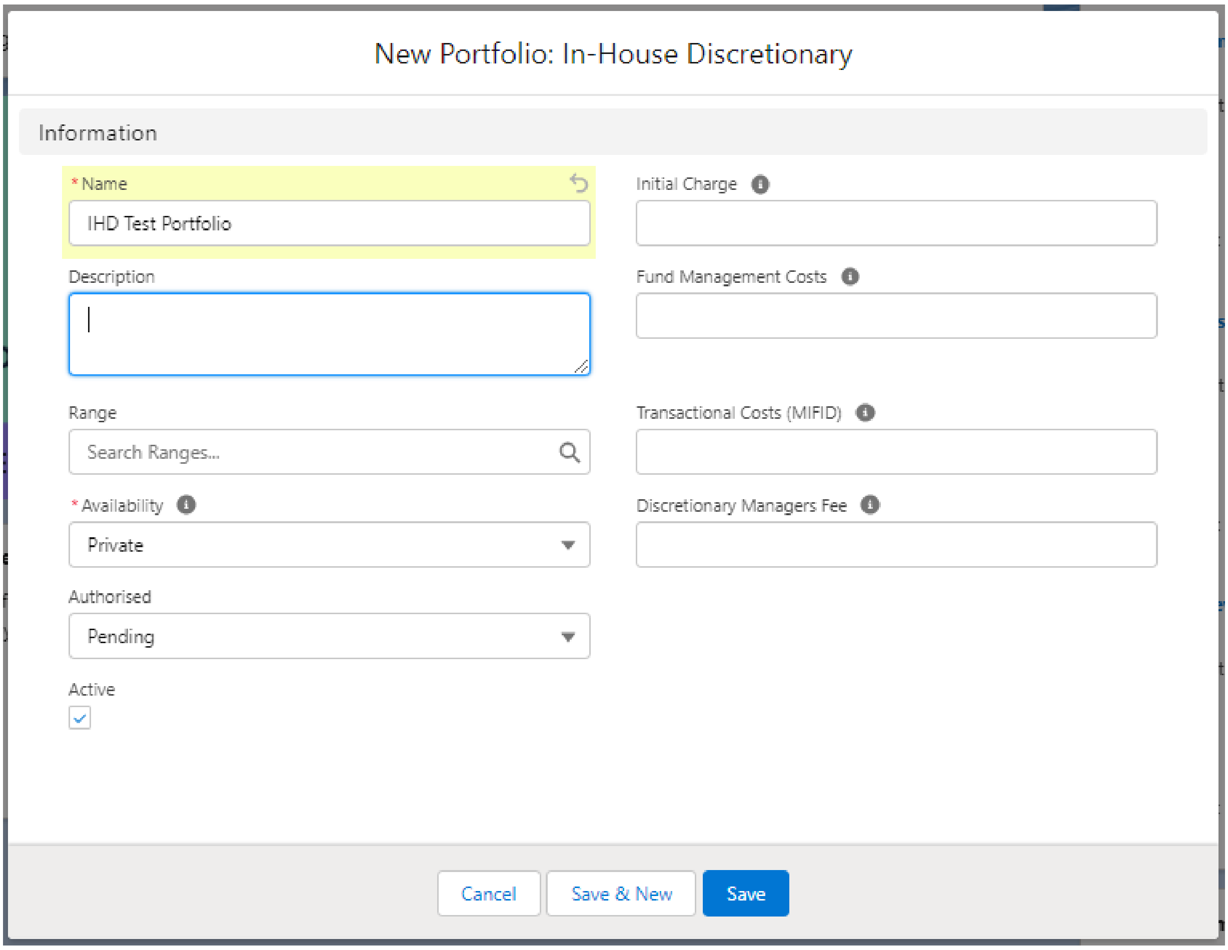
Click into the **Portfolio Builder** tab and select **New** or use the drop down arrow to create a **New Portfolio:**



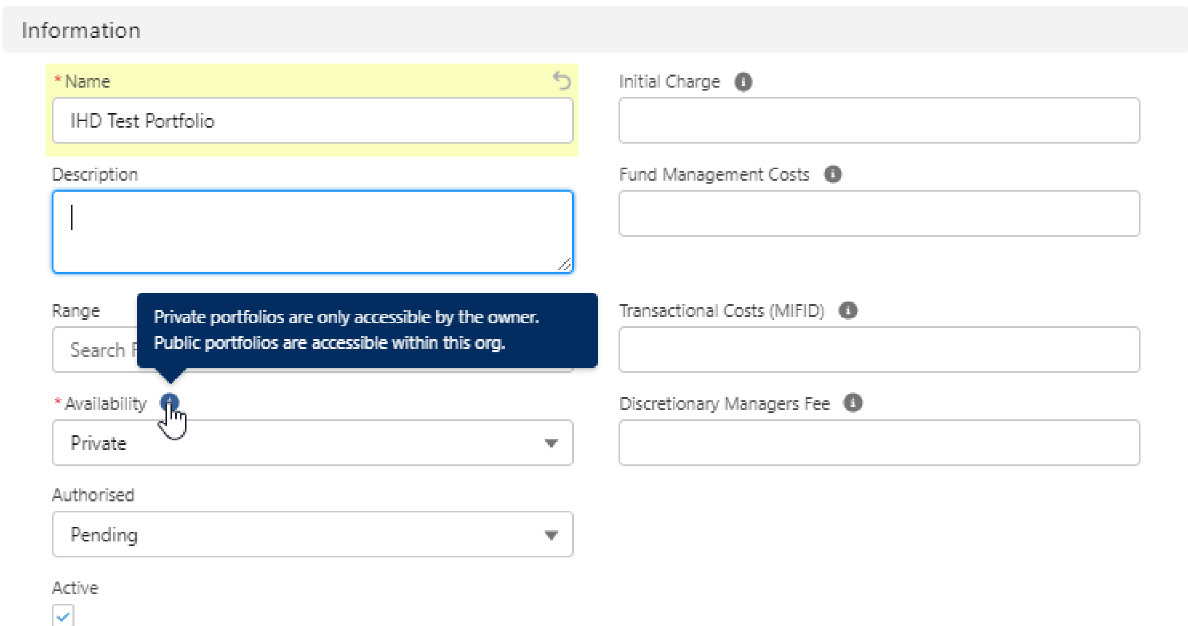
Click **In-House Discretionary** and **Next:**



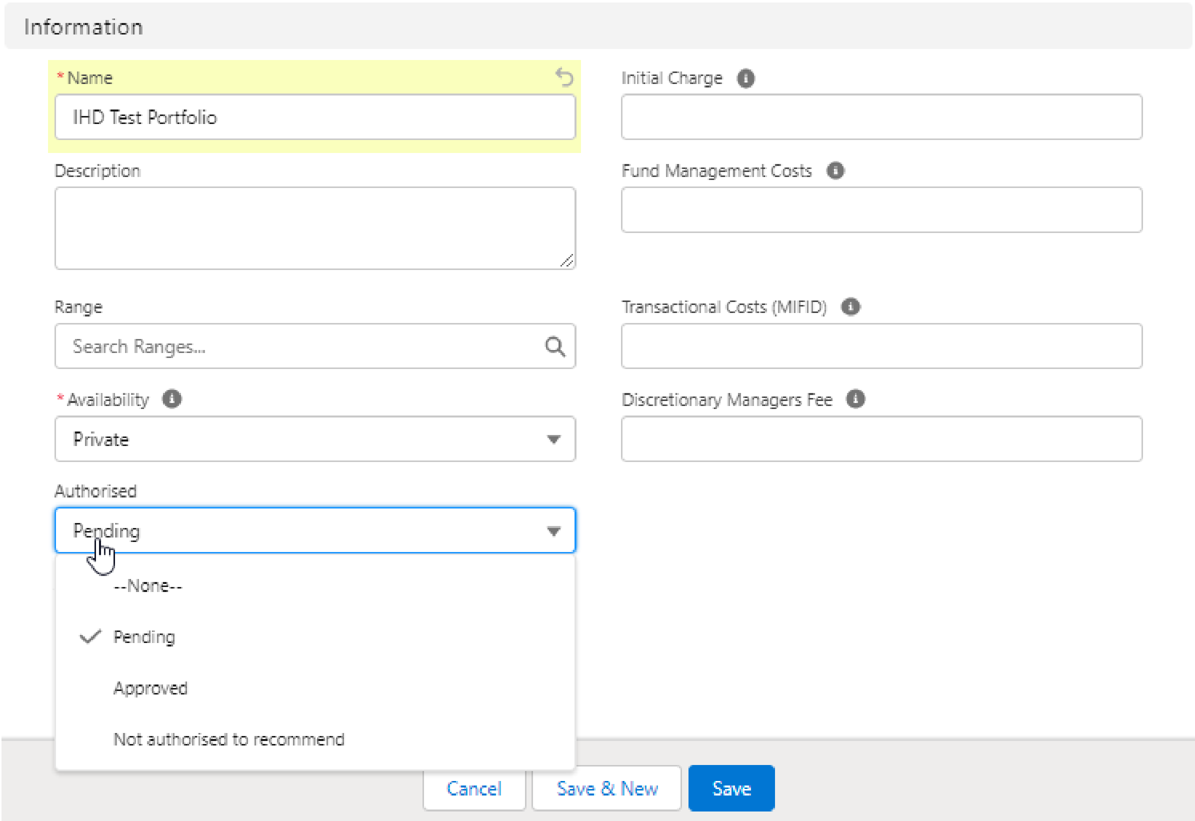
Complete the details of the portfolio:



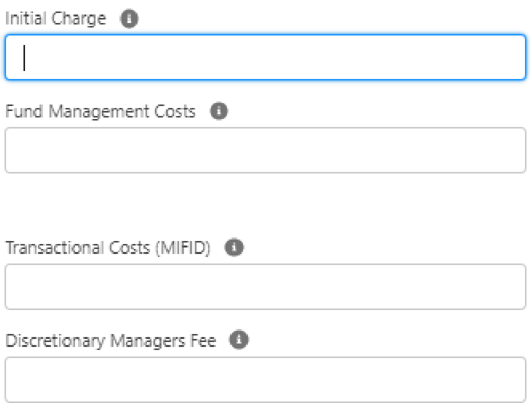
Private or **Public** can be selected under Availability. Private portfolios are only accessible by the owner & Public portfolios are accessible to anyone within the org.



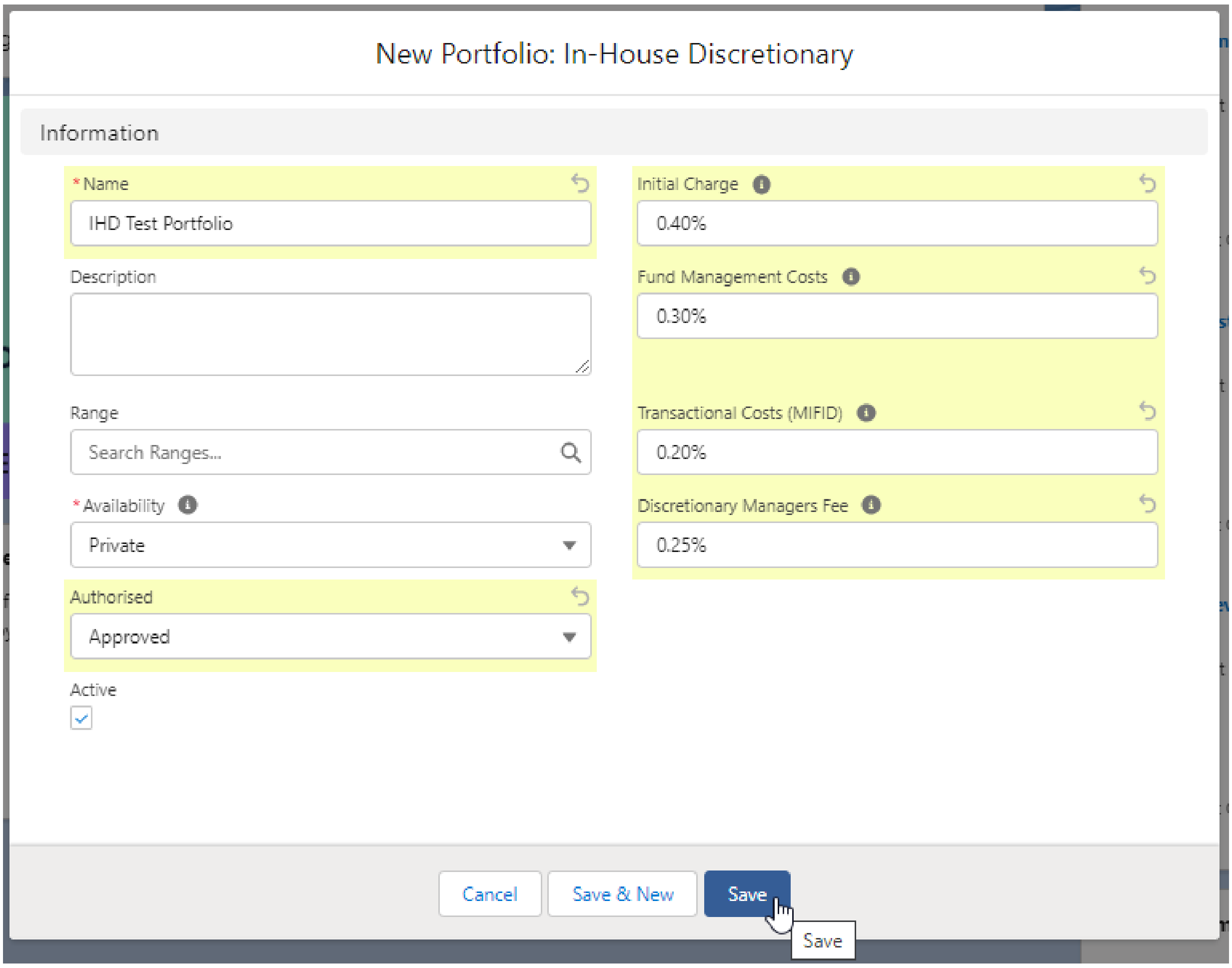
If you are working on the portfolio, select **Pending.** If not authorised to use, select **Not authorised to recommend.** If approved to use, select **Approved.**

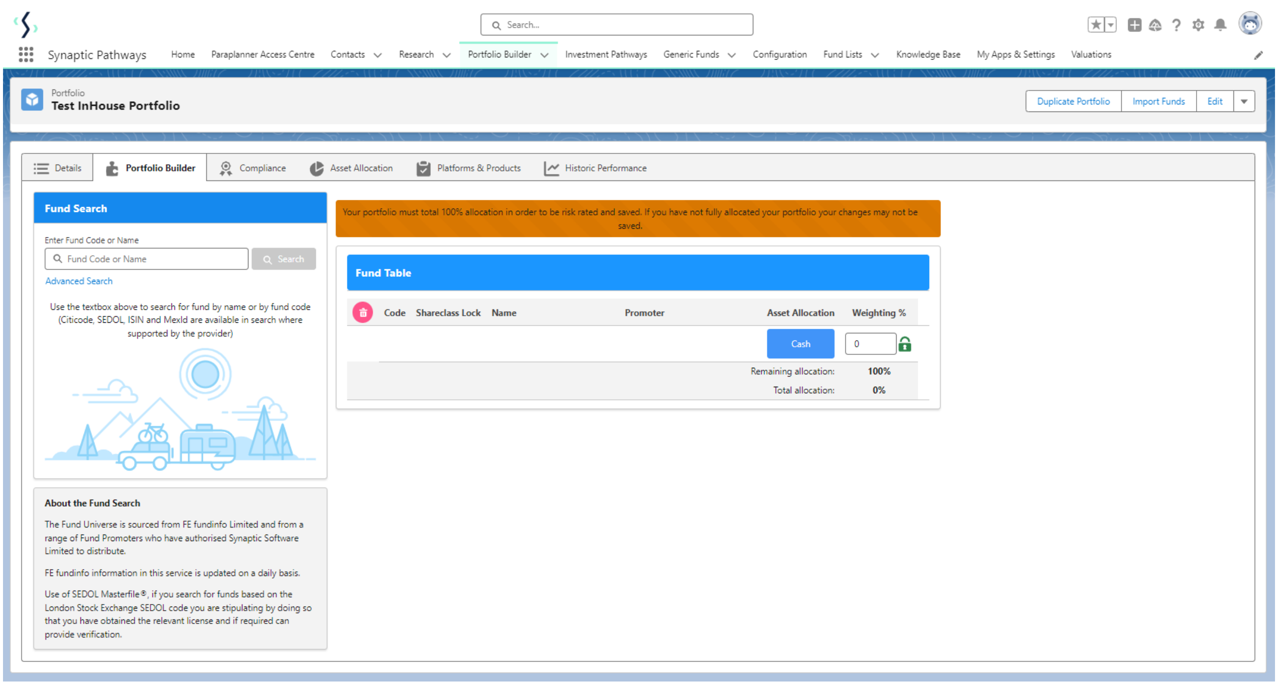


Complete the charge information. The Fund Management Costs, Transactional Costs (MiFID) and Discretionary Managers Fees form part of the Ongoing Headline Charge of the Portfolio.



Save





For further information on In-House Discretionary Portfolios, see article In-House Discretionary - Funds