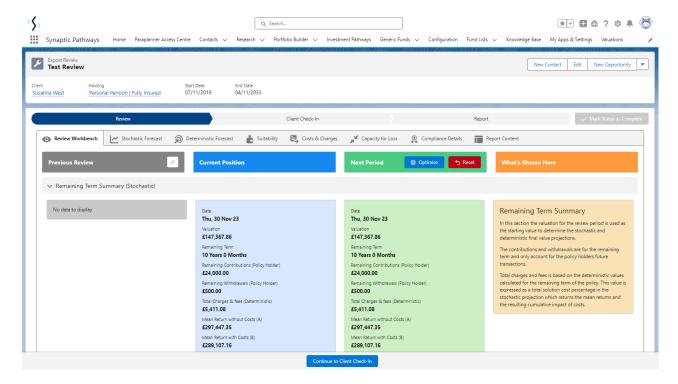
Ex-Post Reviews - Review Screen

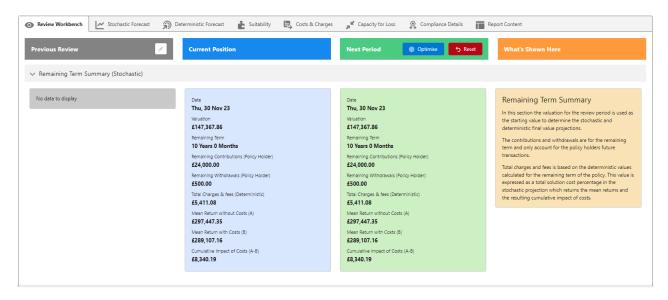
Last Modified on 30/11/2023 1:18 pm GMT

This article is a continuation of Ex-Post Reviews

When the review has been created, you will be taken to the Review screen:



The screen is split into Previous Review, Current Position and Next Period:



Previous state will list the information from a past investment snapshot. This area will be blank if this is the first review for the holding.

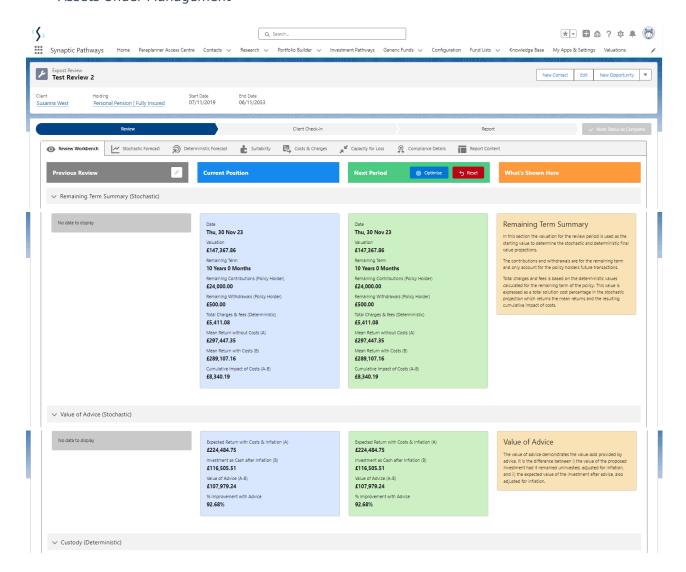
Current state will display the investment based on where it is today

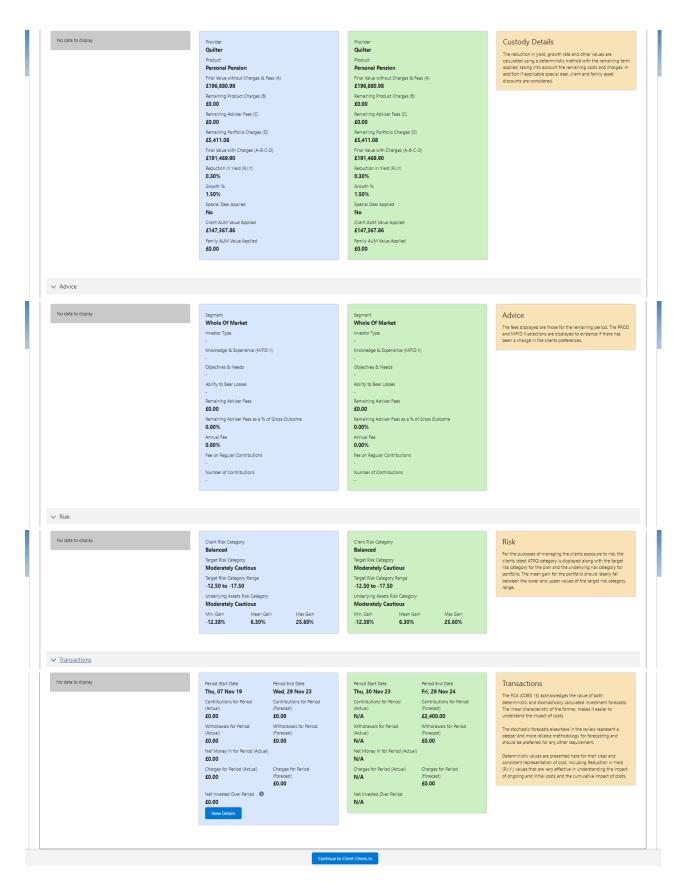
Next Period allows you to tweak multiple details through the optimise button and view the

updated values for the next period.

You are able to optimise the following:

- Investment Details
- Contributions & Withdrawals
- Costs & Charges
- Optimise Portfolio
- Assets Under Management





For further information on Ex-Post Reviews, see article Ex-Post Reviews - Edit