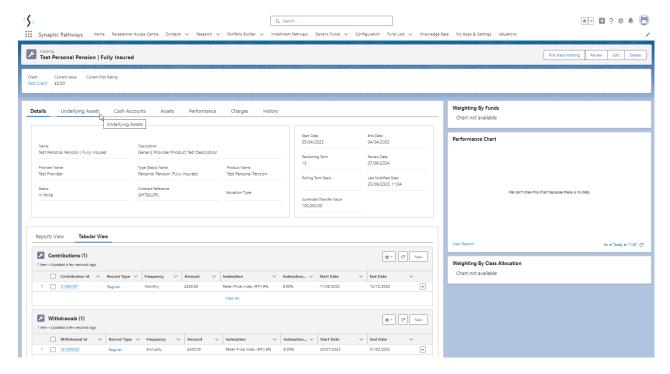
Generic Holdings - Underlying Assets

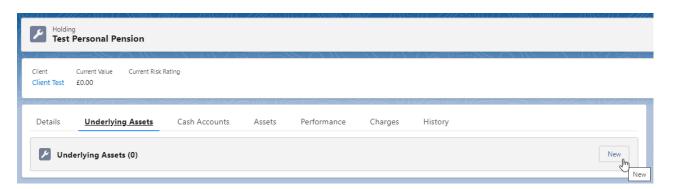
Last Modified on 25/09/2023 11:11 am BST

This article is a continuation of Generic Holdings - Withdrawals

To add underlying assets to a generic holding, click into the **Underlying Assets** tab:

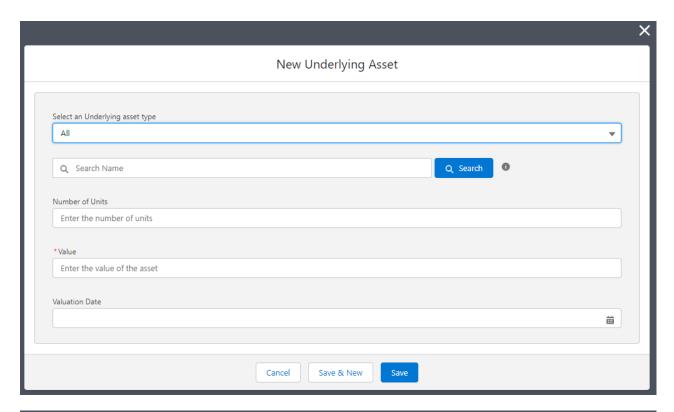


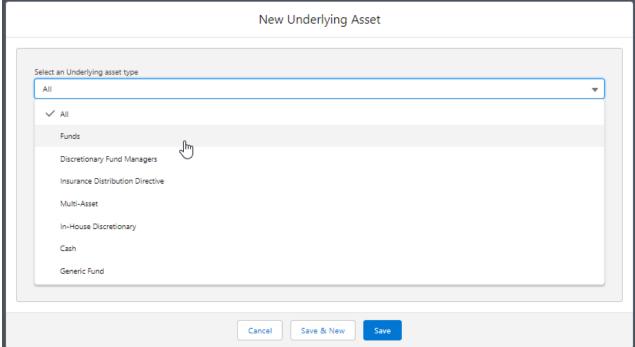
Click New



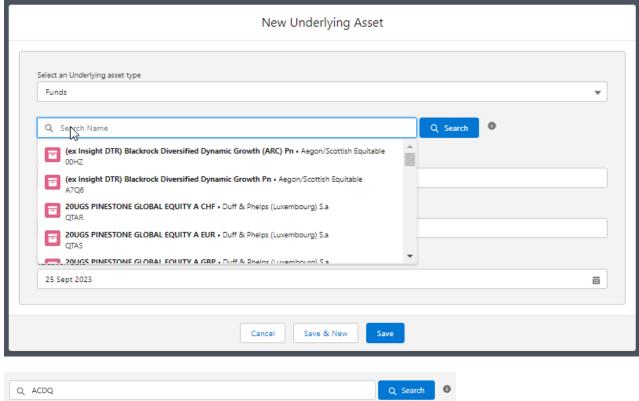
Complete the details of the asset.

Either leave Underlying asset type to **All** or use the drop down to narrow the search:



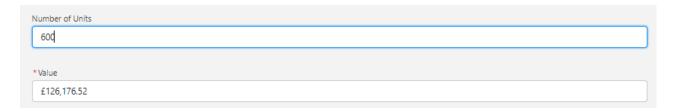


Search for the asset using either Citicode, SEDOL, ISIN, and MexID (where supported by the provider)

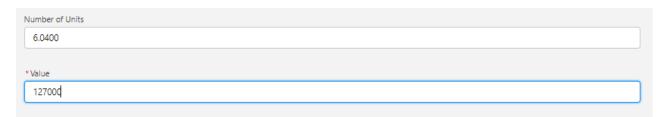




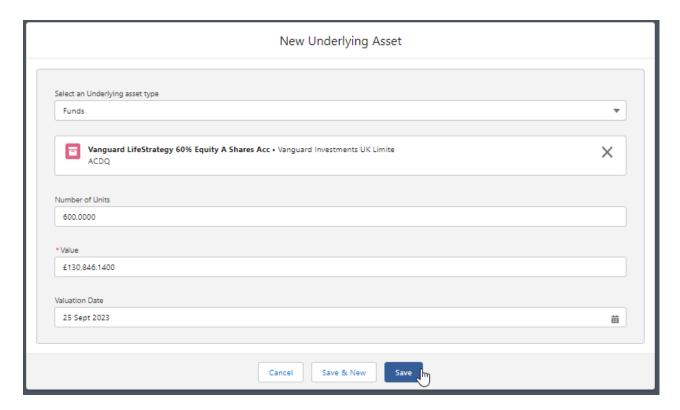
As you enter the units, the value will automatically calculate:



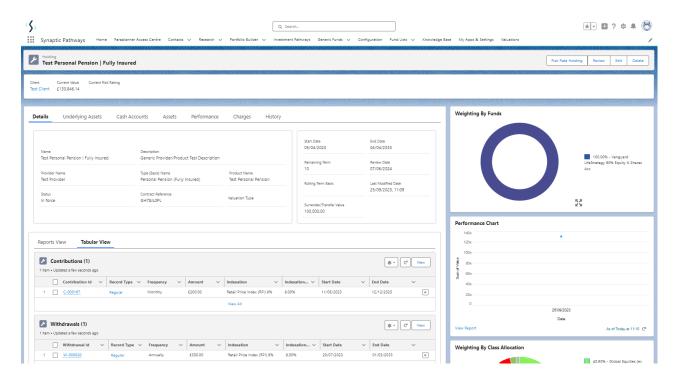
If you would prefer to enter the value, it will automatically calculate the units:

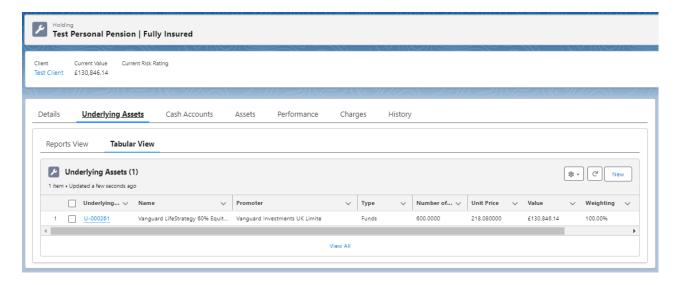


Once complete, Save



Once saved you will be taken to the holding detail screen. The holding now reflects the asset details:





For further information on Holdings, see article: Generic Holdings - Cash Accounts