

# Adding/Removing Portfolios from the Central Investment Proposition

Last Modified on 23/02/2024 12:05 pm GMT

Navigate into the Investment Pathways tab.

Click into the CIP you would like to amend:

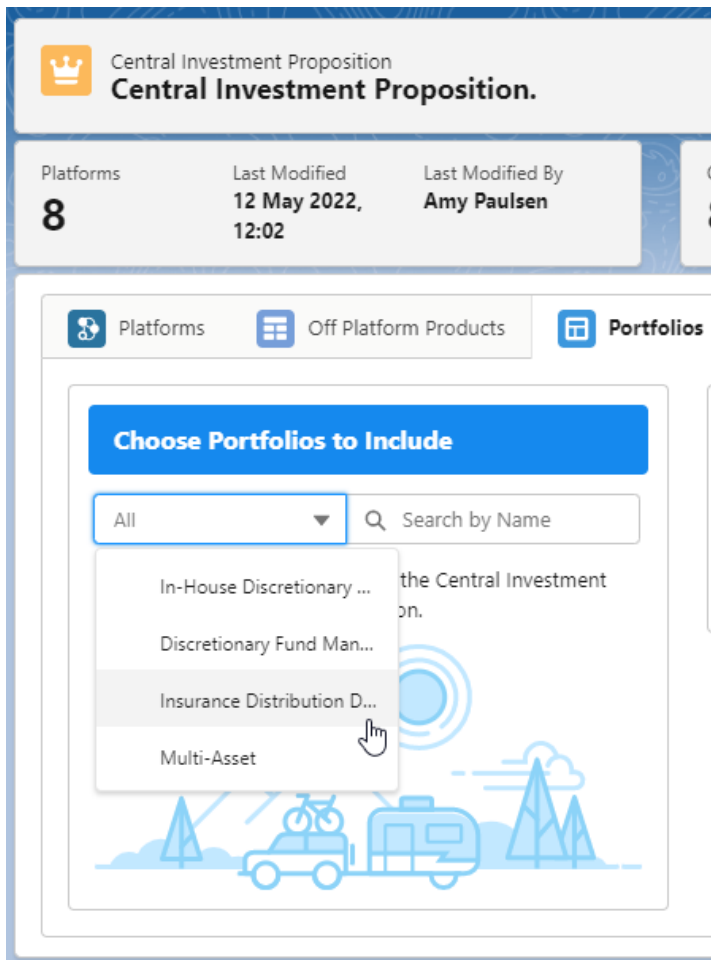
The screenshot shows the 'Investment Pathways' interface. At the top, there is a navigation bar with 'Investment Pathways' selected. Below this, the 'Central Investment Proposition' section displays a table with columns: Name, Description, Active, Last Modified, and Owner. The first row is 'Central Investment Proposition Sep23' with a description of 'Test CIP' and is active. Below this, there is a 'Portfolios' section for 'Discretionary Fund Managers'. It includes a search bar and a table with columns: Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date. The table lists several portfolios, including '7IM Active Adventurous Model Portfolio' and '7IM Active Balanced Model Portfolio'.

Click into the Portfolio Tab:

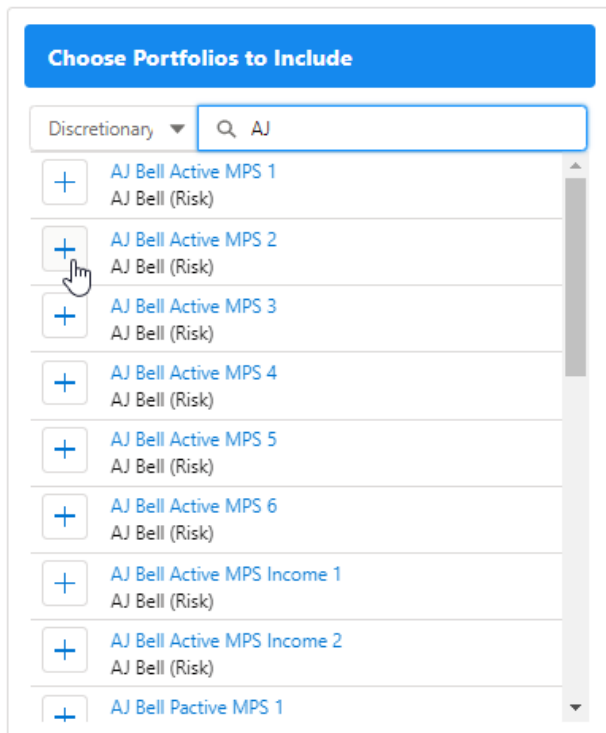
This screenshot shows the 'Portfolio' tab within the 'Central Investment Proposition Sep23' interface. At the top, there are summary statistics for Platforms (2), Off Platform (0), Portfolios (3), and Segments (1). Below this, there are tabs for 'Platforms', 'Off Platform Products', 'Portfolios', 'Fund Lists', and 'Segments'. The 'Portfolios' tab is active, showing a 'Choose Portfolios to include' section on the left with a search box and a 'Portfolios Selected' section on the right. The 'Portfolios Selected' section has a 'Filter by Type' dropdown and a search box. It lists three selected portfolios: 'IHD Portfolio - 1', 'IHD Test Portfolio', and 'IHD Test Portfolio AP', each with a 'Remove' button.

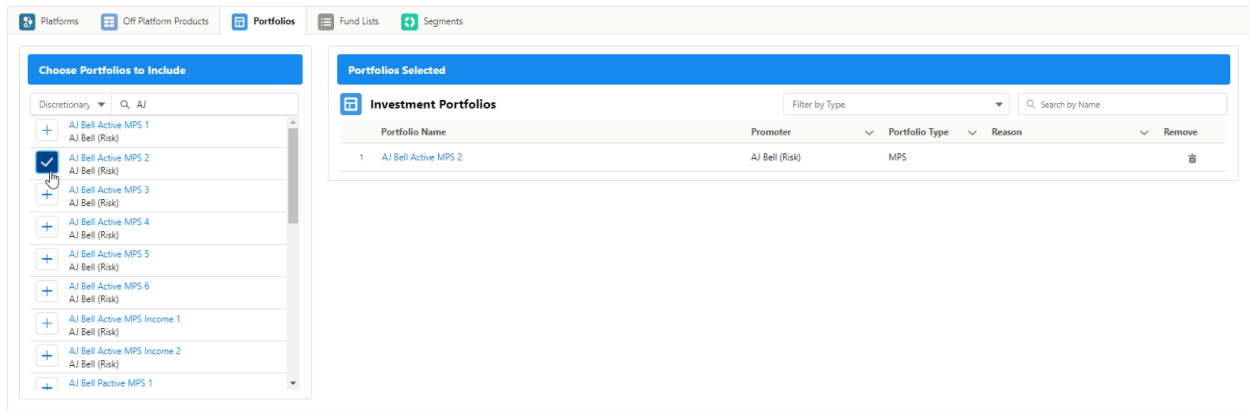
Use the search box on the left of the screen to find Portfolios you would like to add to the CIP.

The all dropdown can be used to set what type of portfolio you would like to search for:

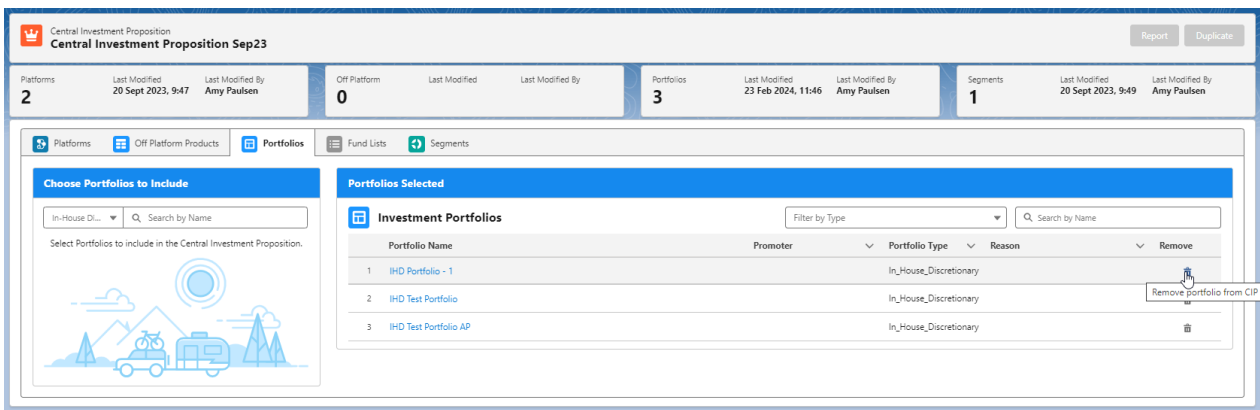


Search and select the + to add to the Portfolios Selected area:





Remove Portfolios through the bin icon:



You will need to add portfolios to any segments you have created. See article [Central Investment Proposition - Adding Portfolios to a Segment](#)