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:

Synaptic Pathways Home	Paraplanner Access Centre Contacts 🗸 Res	Q Search earch v Portfolio Builder v I	Investment Pathways Generic Funds 🗸	Configuration Fund Lists 🗸 Kr	nowledge Base My Apps & Settings	🖈 🔹 🚓 ? 🌣 🐥 🧓
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Central Investment Proposition						New
Name	✓ Description	✓ Active	~	Last Modified	✓ Owner	~
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Discretionary Fund Manage	rs			Select a risk category	▼ Q. Search this	ist
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7IM Active Adventurous Model Portfolio	Seven Investment Management (Risk) Activ	e Model Portfolio	Strategic	4.7	Moderately Adventurous	19/02/2024, 14:13
7IM Active Balanced Model Portfolio	Seven Investment Management (Risk) Activ	e Model Portfolio	Strategic	3.4	Balanced	19/02/2024, 14:13
7IM Active Cautious Model Portfolio	Seven Investment Management (Risk) Activ	e Model Portfolio	Strategic	2.2	Moderately Cautious	19/02/2024, 14:12
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Click into the Portfolio Tab:

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Platforms	Fund Lists Segments		
Choose Portfolios to Include	Portfolios Selected		
In-House Di 🔻 Q. Search by Name	Investment Portfolios	Filter by Type	ame
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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:

Central Investment Proposition Central Investment Proposition.							
Platform 8	15	Last Modified 12 May 202 12:02		Last Modified Amy Paulse	-		0
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Search and select the + to add to the Portfolios Selected area:

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Remove Portfolios through the bin icon:

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Platforms Last Modified Last Modified By 20 Sept 2023, 9:47 Amy Paulsen	Off Platform Last Modified Last Modified By	Portfolios Last Modified Last Modified By 3 23 Feb 2024, 11:46 Amy Paulsen	egments Last Modified Last Modified By 20 Sept 2023, 9:49 Amy Paulsen		
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Select Portfolios to include in the Central Investment Proposition.	Portfolio Name	Promoter \lor Portfolio Type \lor	r Reason V Remove		
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	2 IHD Test Portfolio	In_House_Discretionar	ry Remove portfolio from CIP		
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You will need to add portfolios to any segments you have created. See articleCentral Investment Proposition - Adding Portfolios to a Segment