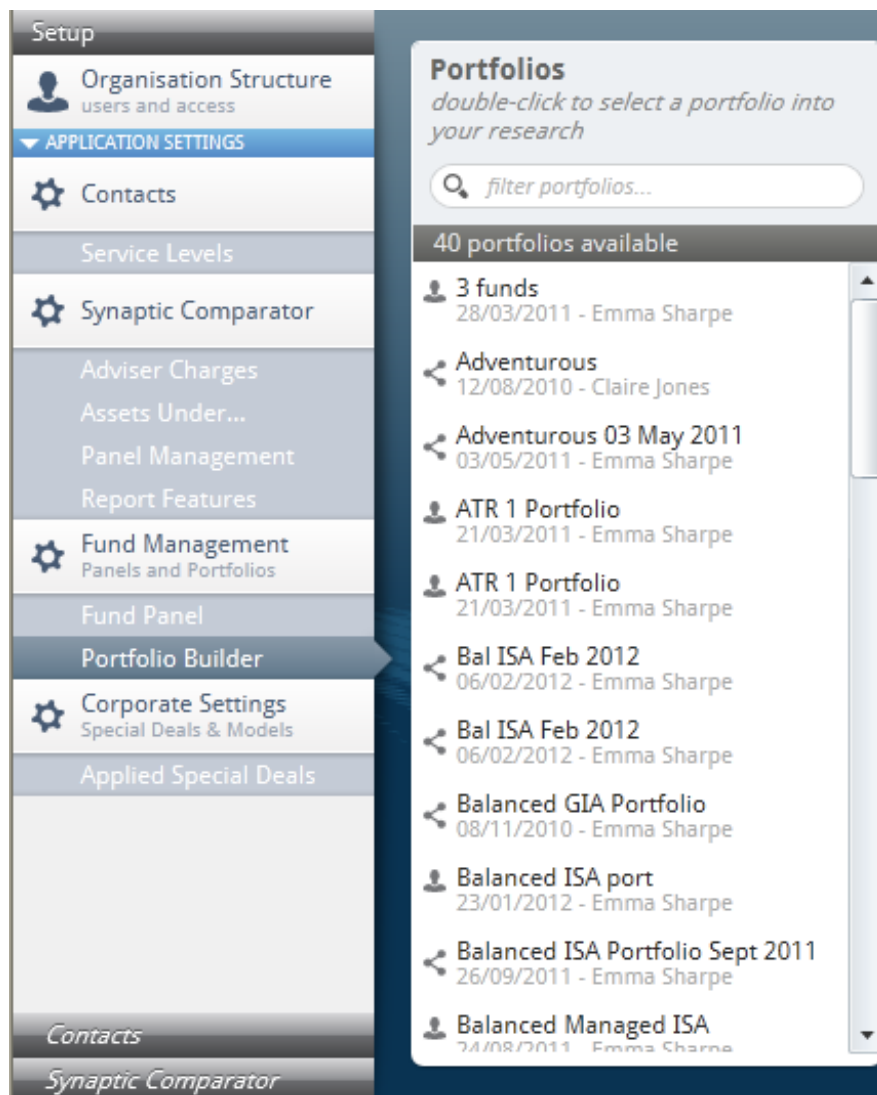# Portfolio Management

Last Modified on 14/02/2020 10:23 am GMT

There are two ways to create portfolios, either during research or prior to research. When creating a portfolio prior to doing research, navigate to **Setup** and then **Portfolio Builder**.

To create a new portfolio here, click **New** on the menu and complete the white fields under **Selected portfolio:**

The differences between the options with **Shared** are as follows:

- Private - this portfolio will only be visible to the person who created it
- Internal - this portfolio will be visible by anyone with a licence within the creators company
- Public - this portfolio will be visible by anyone with a licence within the creators company or any branch of the company recorded in Comparator.

If **Internal** or **Public** are selected, you will need to use a slider to confirm the 'risk' of the portfolio.

Model is to be used if the portfolio being created is a model portfolio from a particular Platform. Any reduction in charges offered by that platform when the portfolio is used, can then be included in the calculations.

Before searching for funds, decide if you are going to use **Parent** or **Child** funds.

Once selected, choose the funds. This can be done by typing the name of the fund, and if you decide to do this we recommend that you type the first few letters of some of the words that make up the name of the fund:

Select the appropriate fund from the list by clicking on it. Once the fund has been selected, use the x in the search area to clear the typed fund name in.

Another way to search for a fund is to use the Citicode of the fund. Type it into the search field:

Click on the fund to add to the portfolio:

The **Split** column will show the percentage split into each fund. In the case above, the split has been changed to 40/60. Double click on the percentage to be changed and enter the new percentage. Any other percentages will be automatically updated.

Once all the funds have been added and the splits (if required) updated, use the **Save** button to save this portfolio.

This portfolio can then be used when completing research.

The other option is to set up the portfolio as you are working through the research itself. If a portfolio is created here, it can be used for other pieces of research.

To create a portfolio whilst completing research, you will need to be in the **Funds** area and from here, click **New** and then **New Portfolio:**
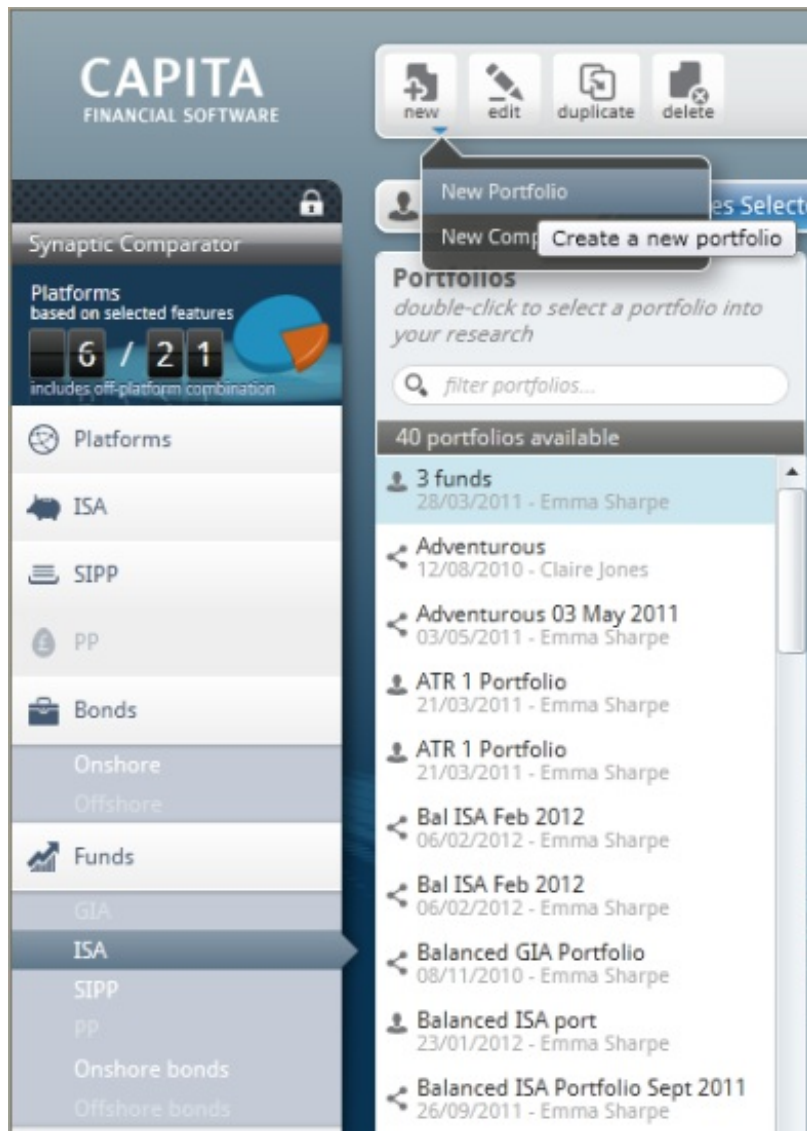
Once **New Portfolio** has been selected, set up the portfolio as described above.