I cannot find a specific fund in Modeller – why is this?

In order to search for a fund, start to enter the name of it in the search box. All funds that match what you have typed will appear in the list below for selection.

You can also look for funds based on the universe, limited to, sector, promoter and whether the fund is a parent or a child fund.
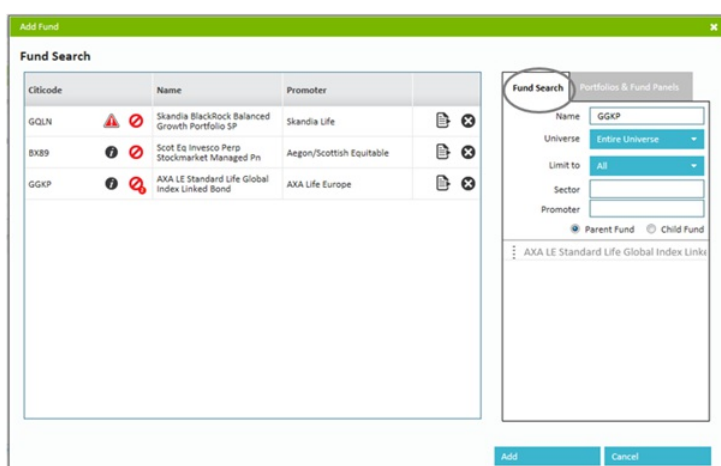
Funds that have already been selected will be "greyed out" in the search results.

Alternatively you can select entire portfolios or panels (or indeed any fund contained within it) by selecting the "Portfolios & Fund Panels" tab on the right hand side.

This will present you with the list of all existing portfolios and panels you have.

From there you can drag & drop the entire portfolio or by clicking (once) on a portfolio or panel it will display the individual funds that make it up for you to select them individually.