

Fund Universe

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From here you can have a 'read only' view of whether you have a restricted list of funds within the software.

If this is set to 'inclusion' mode, the funds on screen will be the only funds available for you to use in the applications. If it is set to 'exclusion' mode then the funds on screen will be the funds that you are not able to use in the applications.

You need to be an 'administrator' in order to set the fund universe.

