Can I share portfolios?

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You also have the option of setting the **Sharing**' mode to either Private, Internal or Public as shown below.

Q. Search Clients			0							 ius
Portfolio Builder										
🛿 import by Citicade 🔌	Portfolio W	Vicard 🔊 Portfolio	o Factsheet							
Edit Portfolio	Name Balanced Fund Risk Level None *			Sharing	Private					
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By setting the portfolio to one of the options, you will allow access to the portfolio to different User groups as defined below:

- Private can only be used by the person who created the portfolio
- Internal can be used by any User in your organisation
- Public can be used by Users in your organisation and all sub/child organisation