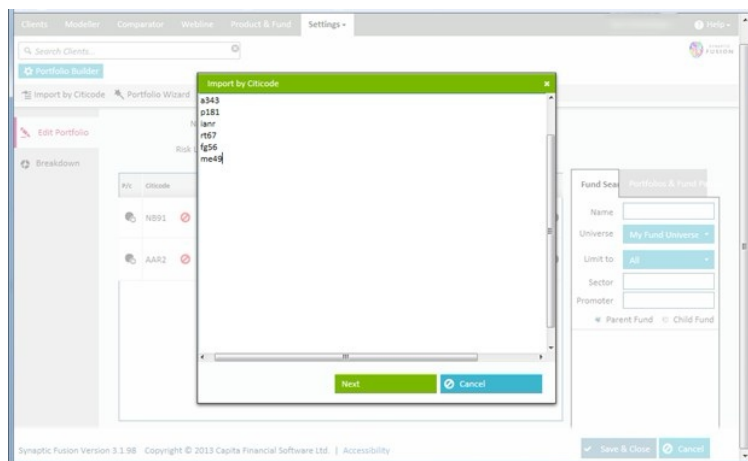
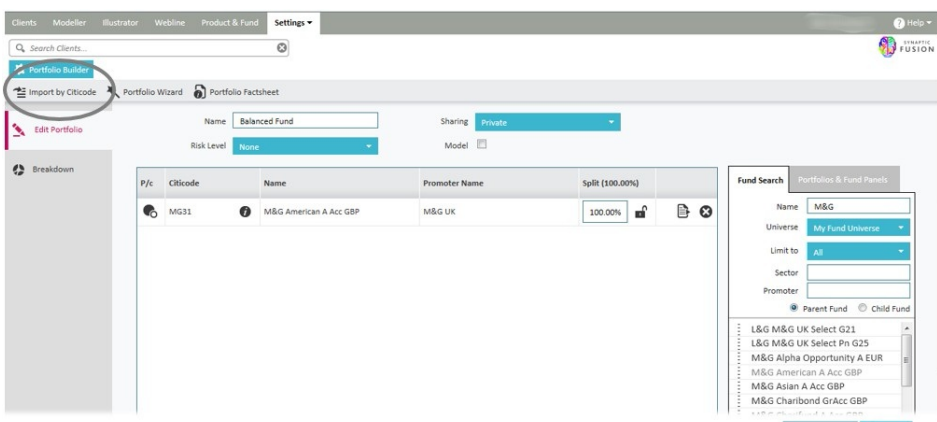


Can I import funds by Citicode?

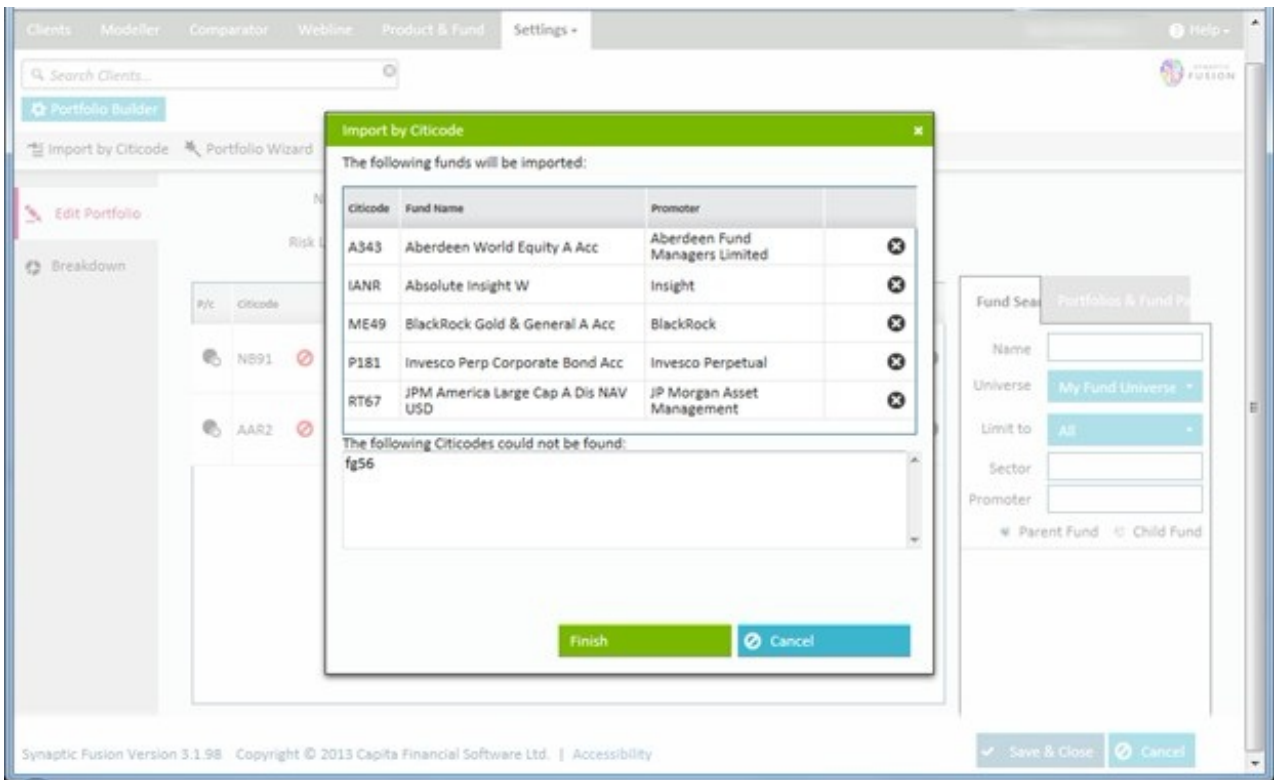
Last Modified on 19/02/2020 11:09 am GMT

You can import an entire list of funds using the **Import by Citicode** button if you have these codes available.

You have the option to free type the codes in manually or copy and paste from another source as shown in the screen shot below:



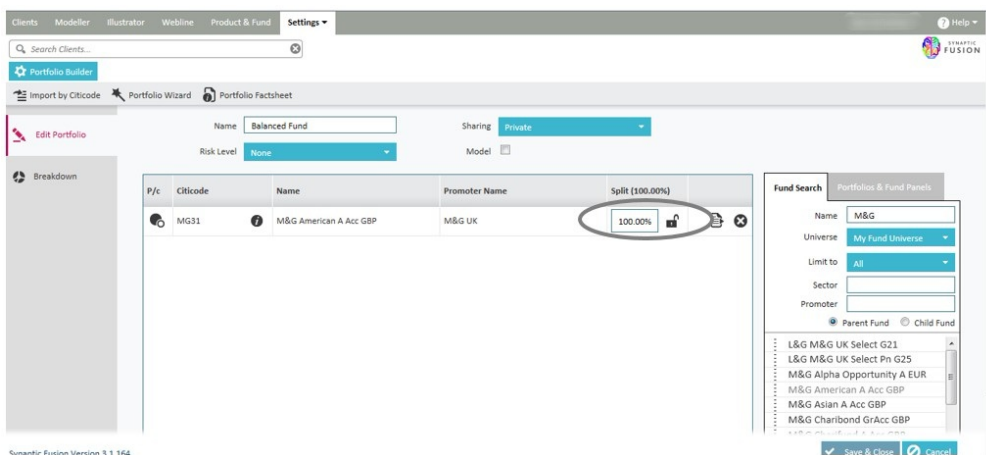
By clicking the **Next** button this will verify that the codes are correct and highlight any funds that cannot be found as the following screen shot demonstrates.



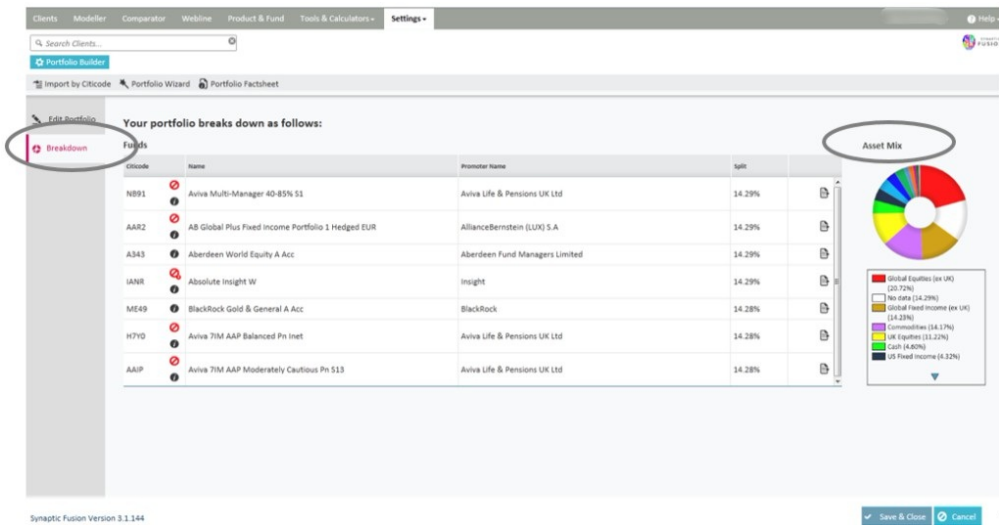
By clicking the **Finish** button you will populate the selected funds which are valid into the portfolio that you are constructing.

You will then be required to input the weightings for each fund (if a Portfolio).

You should note that importing by citicode will always set the imported funds to child mode. If you require parent mode you would need to click on the relevant icon.



You can also view the **Breakdown** and the **Asset Mix** from the screen below:



If you are happy with the portfolio breakdown you can click on the **Save and Close** on the bottom right of the screen to save the portfolio.