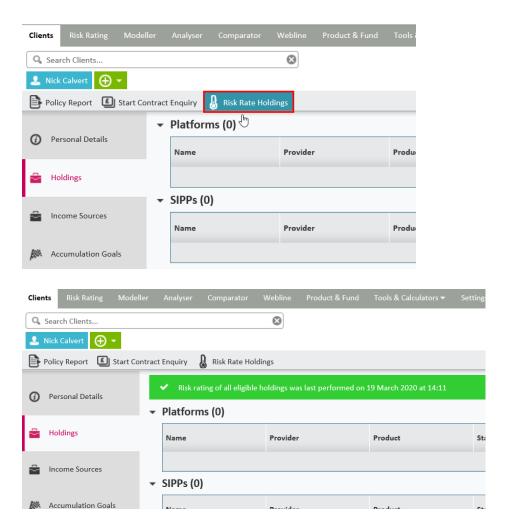
Risk Rated Holdings within the Client Module

Last Modified on 20/03/2020 4:10 pm GMT

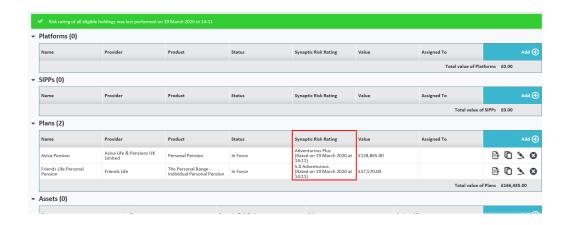
We have introduced the ability to risk rate your client's holdings within the Synaptic Suite.

When within the Holding screen, you can select the button 'Risk Rate Holdings'. This will work through all your client holdings to calculate the risk rating.

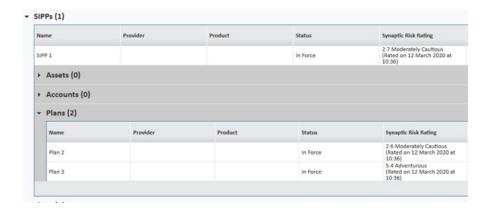
Note - This will only be successful on holdings with a 100% asset allocation



The risk rating can be found under the 'Synaptic Risk Rating' column:



When risk rating Platforms & SIPPs, it will risk rate at individual Plan, Account & Asset levels as well as at Platform/SIPP level.



Holdings can be risk rated as many times as you would like throughout the day.