

# Investment Pathways

Last Modified on 26/05/2022 12:34 pm BST

The Investment Pathways tab contains the Central Investment Proposition, view Discretionary Fund Managers, Multi-Asset, Model Portfolios, Insurance Distribution Directives and Bespoke Portfolios:

Synaptic Pathways
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Investment Pathways

Central Investment Proposition
New

Name	Description	Active	Last Modified	Owner
Test1	test	Yes	18/11/2021, 11:03	Wing Bepko
Test123	Test	Yes	24/11/2021, 15:35	Wing Bepko
Central Investment Propo...	Description CIP	Yes	06/09/2022, 12:24	Wing Bepko
SMS		No	12/10/2021, 17:34	Wing Bepko
HighNetWorth	High Net Worth	Yes	02/11/2021, 10:18	Wing Bepko
	Retirement	Yes	22/10/2021, 09:48	Wing Bepko
		Yes	28/10/2021, 13:27	Wing Bepko
		No	31/12/2021, 12:11	Wing Bepko

Discretionary Fund Managers

Filter by Synaptic Risk Rating  
 Select a risk category

Search by Name, Promoter or Range  
 Search this list...

Name	Promoter	Range	Asset Class Type	Risk Rating	Risk Category	Last Updated Date
Passive Moderately Cautious	Seven Investment Management (Risk)	Passive	Strategic	5	Balanced (Low End)	21/03/2022, 17:00
8AM Clever MPS 3	Clever Adviser (Risk)	MPS	Strategic	3	Moderately Cautious (Low End)	26/04/2022, 16:51
8AM Clever MPS 4	Clever Adviser (Risk)	MPS	Strategic	4	Moderately Cautious (High End)	26/04/2022, 16:42
8AM Clever MPS 5	Clever Adviser (Risk)	MPS	Strategic	6	Balanced (High End)	26/04/2022, 16:37
8AM Clever MPS 6	Clever Adviser (Risk)	MPS	Strategic	7	Moderately Adventurous (Low End)	26/04/2022, 16:37
8AM Clever MPS 7	Clever Adviser (Risk)	MPS	Strategic	5	Balanced (Low End)	26/04/2022, 16:30

Model Portfolios

Search by Name or Range  
 Search this list...

Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status
1 Adventurous	Yes	6	Balanced (High End)		Private	11/02/2022, 15:46	Valid
2 Another Example	Yes	7	Moderately Adventurous (Low End)		Private	22/03/2022, 10:33	Valid
3 Blake	Yes	8	Moderately Adventurous (High En...		Private	16/12/2021, 14:01	Valid
4 CIP 2	Yes	7	Moderately Adventurous (Low End)		Private	01/04/2022, 15:57	Valid
5 CIP 2 - 2022	Yes				Private	01/04/2022, 15:58	Requires Attention
6 David	Yes	8	Moderately Adventurous (High En...		Private	10/02/2022, 14:23	Valid
7	Yes	8	Moderately Adventurous (High En...		Private	14/03/2022, 16:30	Valid

Bespoke Portfolios

Search by Name or Range  
 Search this list...

Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status
1 11212	Yes	7	Moderately Adventurous (Low End)		Private	09/12/2021, 11:40	Valid
2 AA Portfolio	Yes				Private	20/04/2022, 12:34	Valid
3	Yes	8	Moderately Adventurous (High En...		Private	02/03/2022, 11:42	Valid
4	Yes	7	Moderately Adventurous (Low End)		Private	22/03/2022, 15:16	Valid
5	Yes	7	Moderately Adventurous (Low End)		Private	22/11/2021, 13:08	Valid

Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status
6 Andy 2	Yes	9	Adventurous		Private	19/10/2021, 10:58	Valid
...	...	...	...	...	...	...	...

  

Portfolio Builder								Search by Name or Range
In-House Discretionary Portfolios								<input type="text" value="Search this list..."/>
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1 Amy's IHDFM	Yes	5	Balanced (Low End)		Public	29/03/2022, 15:20	Valid	
2 CIP Balanced	Yes	5	Balanced (Low End)	Balanced	Private	21/04/2022, 15:39	Valid	
3 IHD - Portfolio 1	Yes	6	Balanced (High End)		Private	21/03/2022, 09:17	Valid	
4 IHD Test Portfolio	Yes	7	Moderately Adventurous (Low End)		Private	31/03/2022, 16:10	Valid	
5 MH Test IHD	Yes	6	Balanced (High End)		Private	05/05/2022, 10:56	Valid	
6 My INHDM	Yes	5	Balanced (Low End)		Private	19/04/2022, 15:56	Valid	
...	...	...	...	...	...	...	...	

For further information about this area, please see the following articles:

[Investment Pathways](#)

[Investment Pathways - Discretionary Fund Managers, Multi-Asset & Insurance Distribution Directives](#)

[Investment Pathways - Model & Bespoke Portfolios](#)