

Investment Pathways - Model & Bespoke Portfolios

Last Modified on 01/03/2021 2:15 pm GMT

You can create/view portfolios within **Portfolio Builder** (As seen in article [Portfolio Builder - Creating a Portfolio](#)) or within **Investment Pathways**.

This article will take you through the **Investment Pathways** area.

The screenshot shows two sections of the Portfolio Builder interface. The top section is titled 'Model Portfolios' and contains a table with 6 items. The bottom section is titled 'Bespoke Portfolios' and contains a table with 3 items. Both tables have columns for Name, Active status, Risk Name, Range, Availability, and Last Modified Date.

Name	Active	Risk Name	Range	Availability	Last Modified Date
IFA firm Balanced model portfolio 05.02.21	<input checked="" type="checkbox"/>	Moderately Adventurous (Low End)		Public	24/02/2021, 14:27
Model Portfolio Test	<input checked="" type="checkbox"/>	Adventurous		Public	15/02/2021, 14:37
Model Portfolio Test 1	<input checked="" type="checkbox"/>	Balanced (Low End)		Public	15/02/2021, 14:36
Model Portfolio Test 1 - Copy	<input checked="" type="checkbox"/>			Private	16/12/2020, 12:47
Model Portfolio Test 2	<input checked="" type="checkbox"/>	Moderately Cautious (High End)		Public	15/02/2021, 14:37
Model Portfolio Test 3	<input checked="" type="checkbox"/>	Balanced (High End)		Public	15/02/2021, 14:37

Name	Active	Risk Name	Availability	Last Modified Date
ashley	<input checked="" type="checkbox"/>	Moderately Adventurous (Low End)	Private	27/01/2021, 14:57
balanced	<input checked="" type="checkbox"/>		Private	04/02/2021, 14:40
Bespoke	<input checked="" type="checkbox"/>	Balanced (Low End)	Private	15/12/2020, 20:18

Click into the portfolio to view details:

The screenshot shows a list of Model Portfolios in the Portfolio Builder interface. A mouse cursor is pointing to the 'Model Portfolio Test 1' entry.

Name
Balanced (HE)
BCR Investments - Sustainable Futures
Model Portfolio Test
<u>Model Portfolio Test 1</u>
Model Portfolio Test 1 - Copy
Model Portfolio Test 2

The screenshot displays the Synaptic Pathways Portfolio Builder interface for a 'Model Portfolio Test 1'. The interface includes a navigation menu at the top with options like Home, Contacts, Portfolio Builder, Investment Pathways, and Configuration. The main content area is divided into several sections:

- Fund Search:** A search box with instructions to search by name or fund code (Citicode, SEDOL, ISIN, and Mxid).
- Fund Table:** A table listing funds with columns for Fund Code, Fund Name, Promoter, Asset Allocation, and Weighting %. The table includes funds like Aegon BlackRock 30/70 Equity and Bond Tracker, Fidelity Global Special Situations Acc, Invesco UK Equity High Income (UK) Inc, and Royal London European Corporate Bond 2 Inc. A 'Cash' button is visible at the bottom of the table.
- Portfolio Summary:** A green box showing the Risk Profile Category as 'Balanced (Low End)' and Risk Rating as '5'. It also displays performance metrics: Minimum Gain in any 1 Year (-14.69% or -£1,469.00), Average Gain in any 1 Year (3.08% or £308.00), and Maximum Gain in any 1 Year (19.38% or £1,938.00).
- Asset Class Weightings:** A bar chart and a legend showing the percentage allocation for various asset classes: UK Equities (26.01%), Global Property (0.01%), Global Bonds (ex UK) (20.02%), Emerging Markets Equities (0.79%), and Cash (6.95%).

New portfolios can be added through the 'New' link on the top of right of either Model or Bespoke portfolios:

The screenshot shows the Portfolio Builder interface with two sections: 'Model Portfolios' and 'Bespoke Portfolios'. Both sections have a 'New' button in the top right corner, which is highlighted with a mouse cursor. The 'Model Portfolios' section lists 6 items, and the 'Bespoke Portfolios' section lists 3 items. Each item includes a checkbox for 'Active', a 'Risk Name', 'Availability', and 'Last Modified Date'.

Model Portfolios						
Name	Active	Risk Name	Range	Availability	Last Modified Date	
Balanced (HE)	<input checked="" type="checkbox"/>	Balanced (High End)		Private	18/02/2021, 12:25	
BCR Investments - Sustainable Futures	<input checked="" type="checkbox"/>	Moderately Adventurous (High End)	BCR Sustainable	Public	04/02/2021, 11:02	
BLACKFINCH BALANCED	<input checked="" type="checkbox"/>	Moderately Adventurous (Low End)		Private	18/01/2021, 16:28	
BLACKFINCH CAUTIOUS	<input checked="" type="checkbox"/>	Balanced (High End)		Public	18/01/2021, 16:26	
Blackfinch Defensive	<input checked="" type="checkbox"/>	Balanced (Low End)		Public	18/01/2021, 16:25	
BLACKFINCH INCOME	<input checked="" type="checkbox"/>	Balanced (High End)		Public	18/01/2021, 16:29	

Bespoke Portfolios				
Name	Active	Risk Name	Availability	Last Modified Date
ashley	<input checked="" type="checkbox"/>	Moderately Adventurous (Low End)	Private	27/01/2021, 14:57
balanced	<input checked="" type="checkbox"/>		Private	04/02/2021, 14:40
javascriptvoid(0); poke	<input checked="" type="checkbox"/>	Balanced (Low End)	Private	15/12/2020, 20:18

For further information on creating a portfolio, see article [Portfolio Builder - Creating a Portfolio](#).