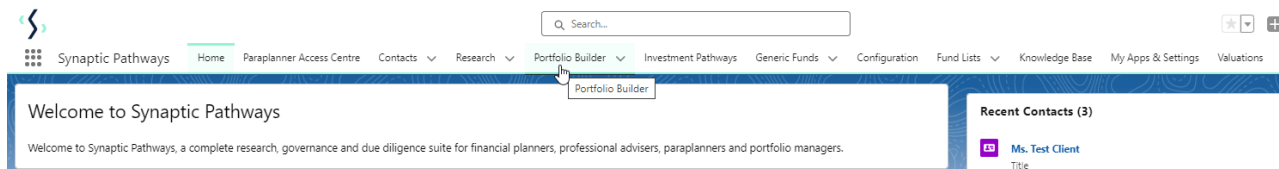


Portfolio Builder - Compliance Tab

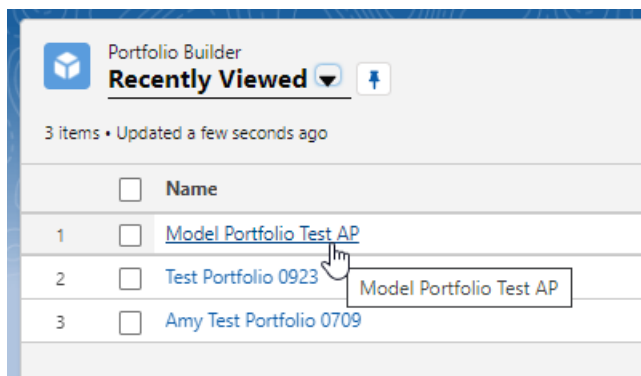
Last Modified on 19/10/2023 11:34 am BST

The compliance tab can be found within your model and bespoke portfolios.

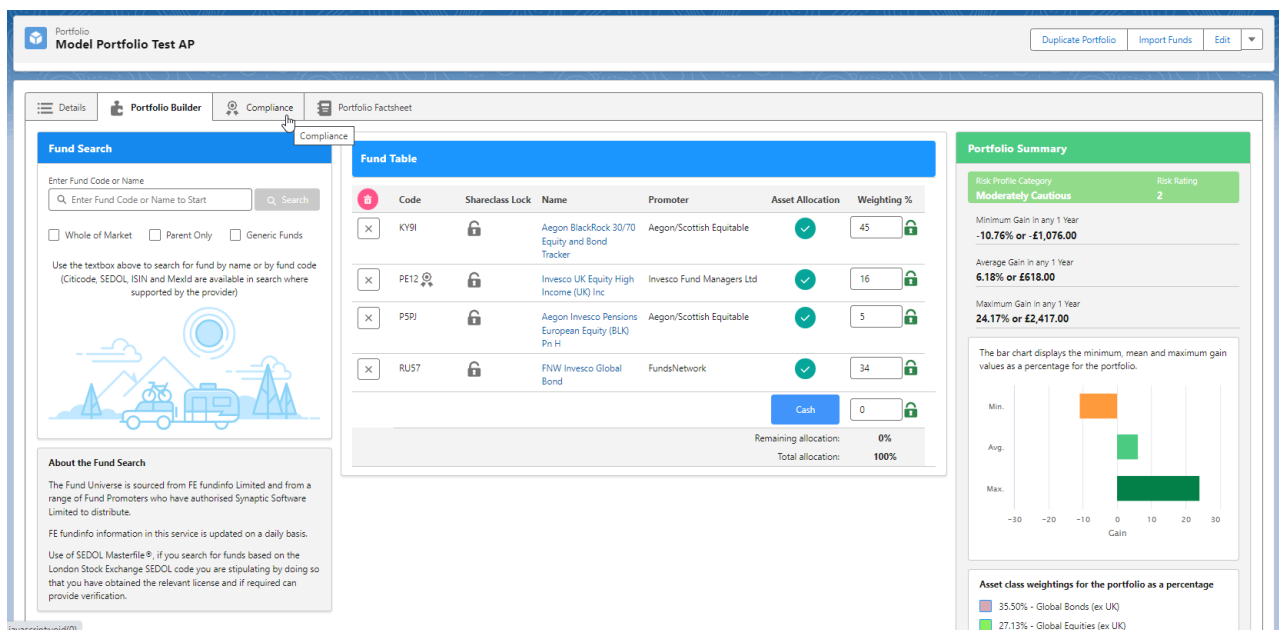
Click on Portfolio Builder in the toolbar or use the search box at the top of the screen to find your portfolio:

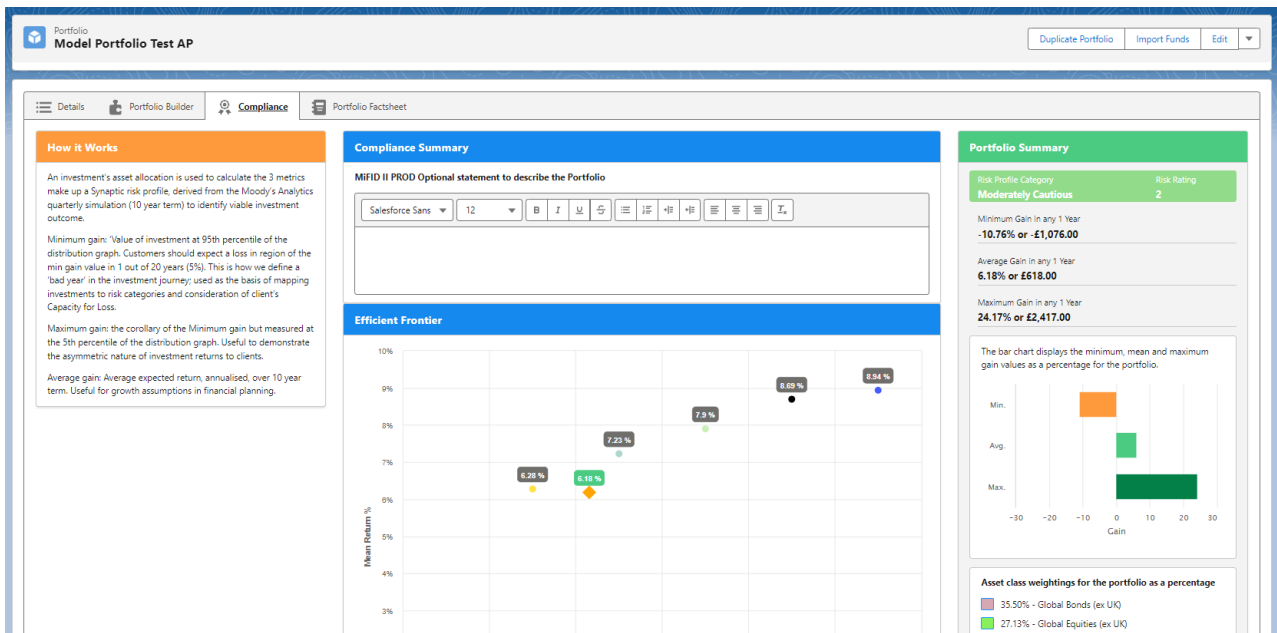


Click into the portfolio:

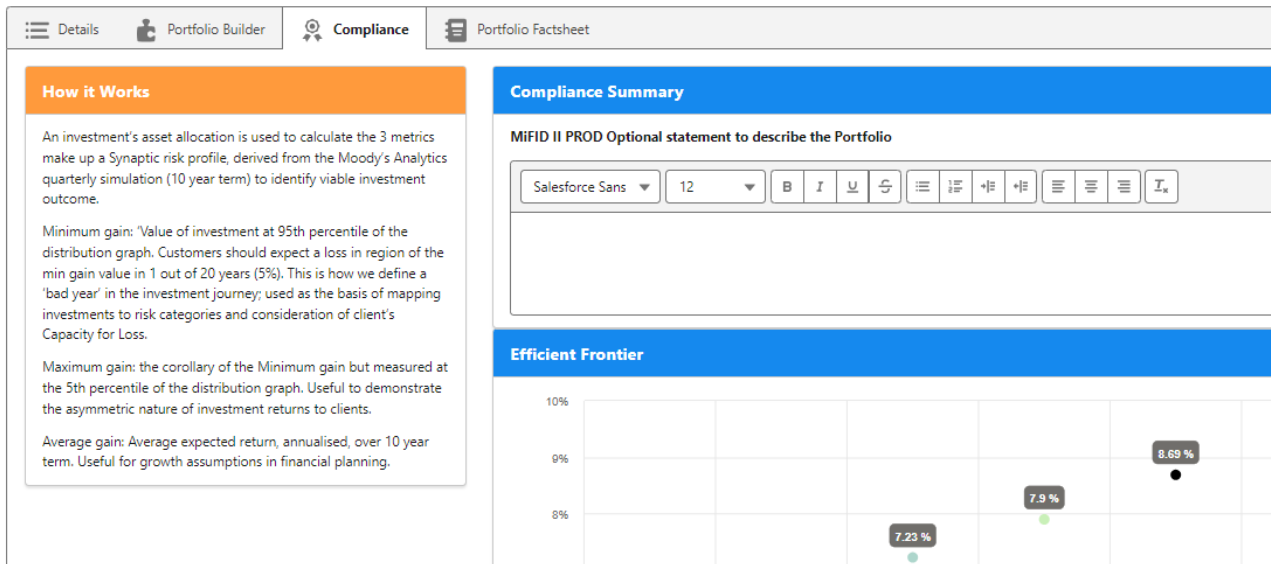


Compliance can be found in the tabs at the top of the portfolio, as seen below:





This area allows you to add a compliance summary for the portfolio (This is an optional)



An efficient frontier graph displays where the portfolio sits against the risk categories, as well as a portfolio summary, asset class graph & legend:

