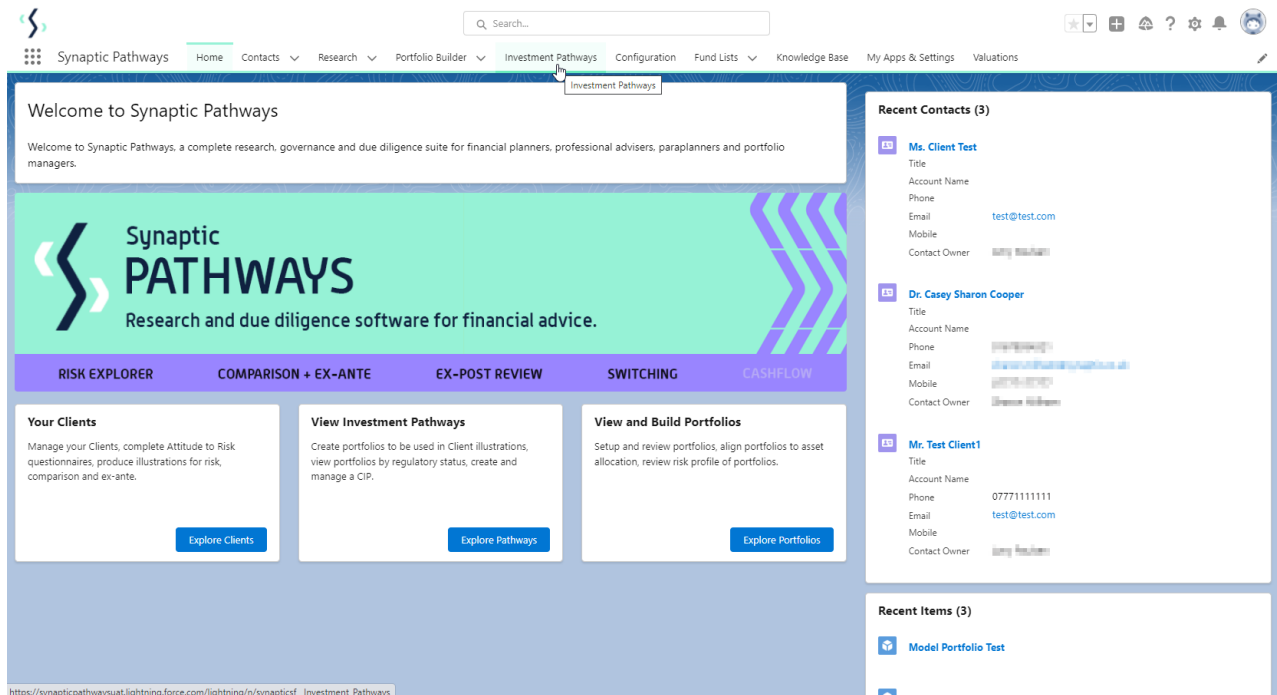


# Creating a Central Investment Proposition

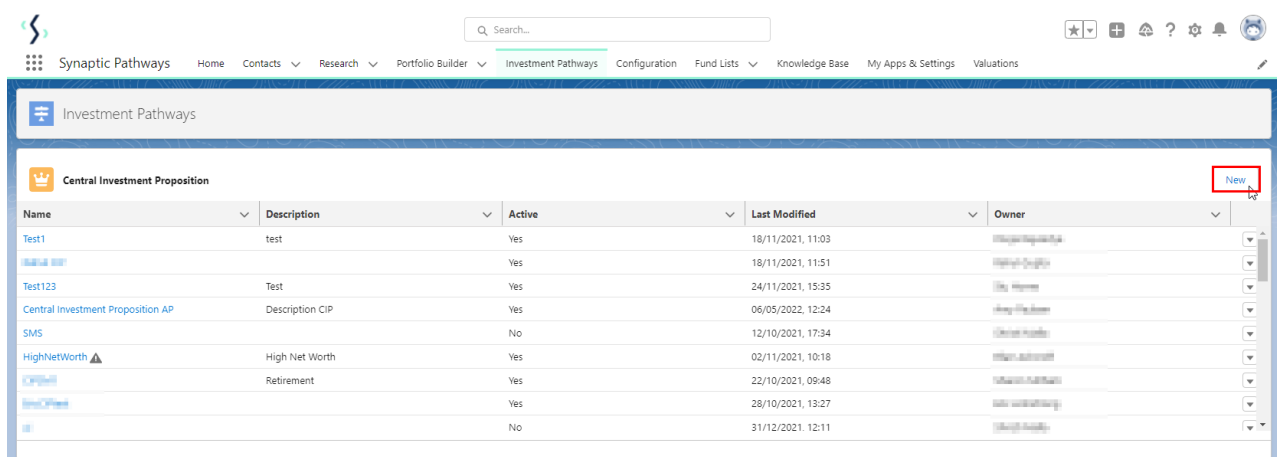
Last Modified on 26/05/2022 12:40 pm BST

**Central Investment Proposition** allows you to set what on & off platform products will be available to research, as well as portfolios, fund lists and segments.

They are created within the **Investment Pathways** tab:



Click **New** under **Central Investment Proposition**



Enter the **CIP Name & CIP Description**. If you would like the CIP active upfront, tick **Active** (You will need to complete setup of the CIP before conducting research). The CIP can be made active after setup.

### New Central Investment Proposition(CIP)

\* CIP Name

CIP Description

Mark Active

Save once complete:

### New Central Investment Proposition(CIP)

\* CIP Name

CIP Description

Mark Active

S

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Investment Pathways
Home
Contacts
Research
Portfolio Builder
Investment Pathways
Configuration
Fund Lists
Knowledge Base
My Apps & Settings
Valuations

Investment Pathways

✓ Success!  
 Central Investment Proposition Central Investment Proposition was created successfully!

✕

👑

Central Investment Proposition

New

Name	Description	Active	Last Modified	Owner
Test1	test	Yes	18/11/2021, 11:03	Ujjwal Rajwade
Test123	Test	Yes	24/11/2021, 15:35	Ujjwal Rajwade
Central Investment Proposition AP	Description CIP	Yes	06/05/2022, 12:24	Arun Patil
SMS		No	12/10/2021, 17:34	Ujjwal Rajwade
HighNetWorth	High Net Worth	Yes	02/11/2021, 10:18	Ujjwal Rajwade
Retirement	Retirement	Yes	22/10/2021, 09:48	Ujjwal Rajwade
Test		Yes	28/10/2021, 13:27	Ujjwal Rajwade
Test		No	31/12/2021, 12:11	Ujjwal Rajwade

📁

Portfolios

Discretionary Fund Managers

Filter by Synaptic Risk Rating

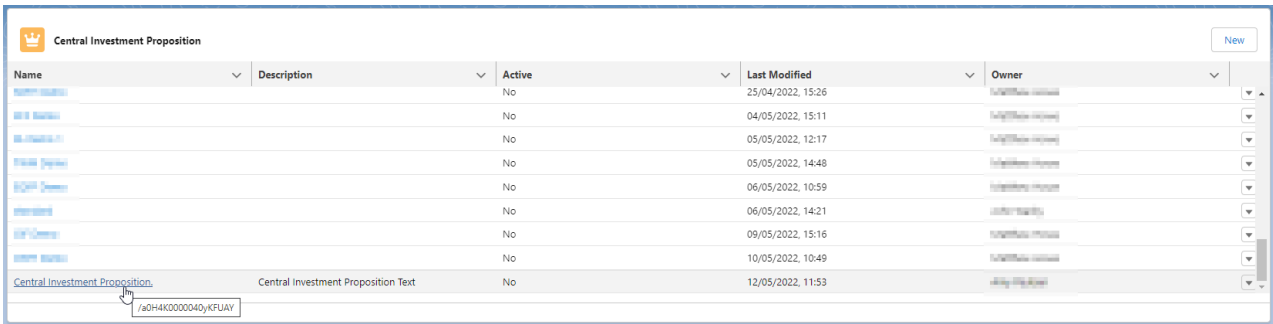
Search by Name, Promoter or Range

Select a risk category

Q Search this list...

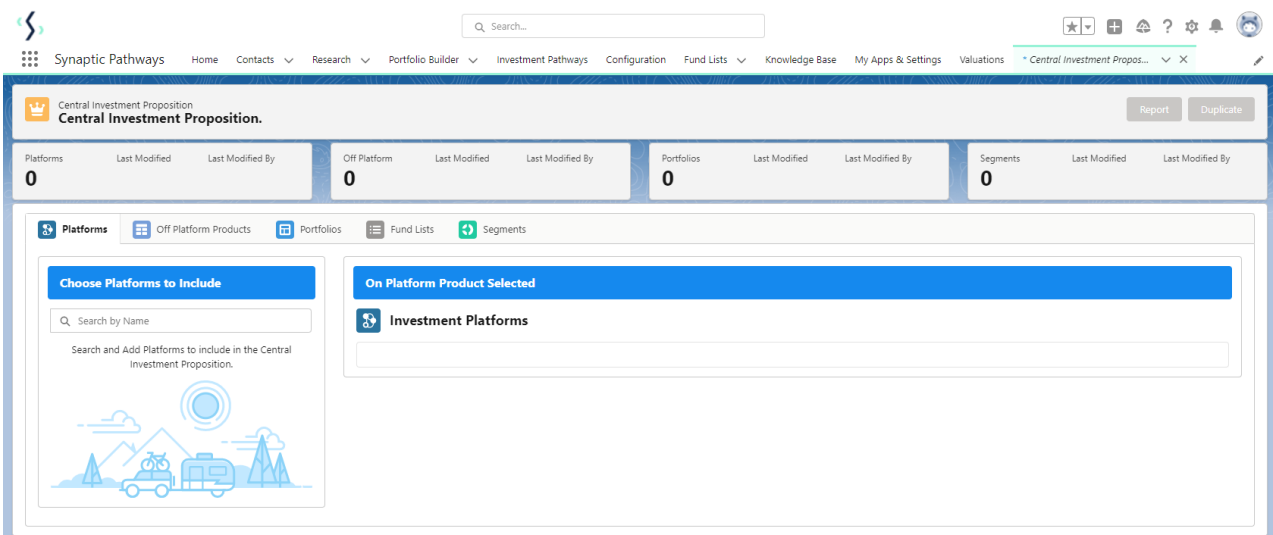
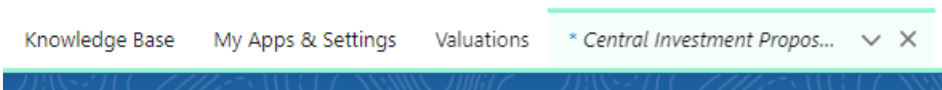
Name	Promoter	Range	Asset Class Type	Risk Rating	Risk Category	Last Updated Date
Passive Moderately Cautious	Seven Investment Management (Ri...	Passive	Strategic	5	Balanced (Low End)	21/03/2022, 17:00
8AM Clever MPS 3	Clever Adviser (Risk)	MPS	Strategic	3	Moderately Cautious (Low End)	26/04/2022, 16:51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

To add details of the CIP, click into the name:



Name	Description	Active	Last Modified	Owner
...	...	No	25/04/2022, 15:26	...
...	...	No	04/05/2022, 15:11	...
...	...	No	05/05/2022, 12:17	...
...	...	No	05/05/2022, 14:48	...
...	...	No	06/05/2022, 10:59	...
...	...	No	06/05/2022, 14:21	...
...	...	No	09/05/2022, 15:16	...
...	...	No	10/05/2022, 10:49	...
Central Investment Proposition	Central Investment Proposition Text	No	12/05/2022, 11:53	...

The CIP will appear in the navigation bar at the top of the screen:



Central Investment Proposition

Report   Duplicate

Platforms   Off Platform Products   Portfolios   Fund Lists   Segments

0   Last Modified   Last Modified By

0   Last Modified   Last Modified By

0   Last Modified   Last Modified By

0   Last Modified   Last Modified By

Choose Platforms to Include

Search by Name

Search and Add Platforms to include in the Central Investment Proposition.

On Platform Product Selected

Investment Platforms

To start entering details into the CIP, see article

Central Investment Proposition - Selecting On & Off Platform Products