

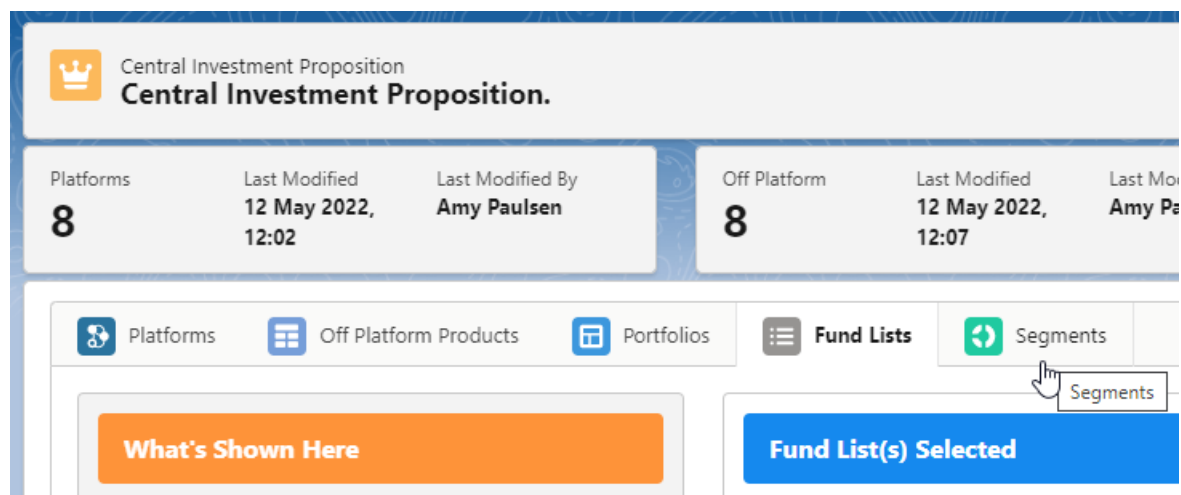
Central Investment Proposition - Creating Segments

Last Modified on 26/05/2022 12:47 pm BST

Creating segments within the Central Investment Proposition allows you to use the on & off platforms, portfolios and fund lists added to the CIP and allocate them to a segment. You are able to set Adviser Fees against each segment and set which users are assigned the segments.

Users that will be using the CIP & Segments, will need to be assigned, otherwise the research will be Whole of Market only.

In the article below, we will be allocating products, portfolios and a fund list to a segment and set the adviser fees. The user will then be assigned to ensure they are able to select the segment at the beginning of the research.



The screenshot displays the 'Central Investment Proposition' dashboard. At the top, there is a header with a crown icon and the text 'Central Investment Proposition' and 'Central Investment Proposition.'. Below the header, there are two summary cards. The left card shows 'Platforms' with a count of '8', last modified on '12 May 2022, 12:02' by 'Amy Paulsen'. The right card shows 'Off Platform' with a count of '8', last modified on '12 May 2022, 12:07' by 'Amy Pa...'. Below these cards is a navigation bar with tabs for 'Platforms', 'Off Platform Products', 'Portfolios', 'Fund Lists', and 'Segments'. The 'Segments' tab is highlighted with a green double-headed arrow icon. Below the navigation bar, there are two main sections: 'What's Shown Here' (highlighted in orange) and 'Fund List(s) Selected' (highlighted in blue). A mouse cursor is pointing at the 'Segments' tab, and a tooltip labeled 'Segments' is visible below it.

Add On/Off Platform Products, Portfolios, Fund Lists, Adviser Fees and Assign Users to the segment

Central Investment Proposition A

Platforms 12 Last Modified 21 Dec 2021, 11:03 Last Modified By Amy Paulsen

Off Platform 13 Last Modified 21 Dec 2021, 11:04 Last Modified By Amy Paulsen

Portfolios 9 Last Modified 05 May 2022, 12:06 Last Modified By Amy Paulsen

Segments 2 Last Modified 05 May 2022, 12:07 Last Modified By Amy Paulsen

Platforms Off Platform Products Portfolios Fund Lists Segments

Add New Segment

Segment Details - Test Segment 1

Investor Type: Retail
Knowledge & Experience: Informed Investor

Investor Type: Retail
Knowledge & Experience: Basic Investor

What's shown here

Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide illustrations for reduction in yield (RY), Ex-ante and Ex-post reviews.

Add / Remove Platforms in CIP from Segment

Platforms Available in CIP

- 7IM Platform
- abrdn Wrap
- Advance by Embark Platform
- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre

Platforms in Segment

Segment Details – Select, Edit or Delete

Select and move items over to allocate to the segment

Click the + next to **Add New Segment**

Add New Segment

Add Segment to CIP

Select + to add a new Segment, then you can add Platforms, Off Platform Products, Portfolios, Adviser Fees and Users

Platforms Off Platform Products Portfolios Fund Lists Segments

Add New Segment

Add Segment to CIP

Select + to add a new Segment, then you can add Platforms, Off Platform Products, Portfolios, Adviser Fees and Users

Complete details of the Segment

Portfolios Fund Lists Segments

Add Segment

* Segment Name: Segment 1 Test

* Target Investor Type: --None--

* Knowledge & Experience Type: --None--

Target Market Statement for PROD Compliance

Cancel Save

Save

Add Segment

* Segment Name: Segment 1 Test

* Target Investor Type: Retail

* Knowledge & Experience Type: Basic Investor

Target Market Statement for PROD Compliance

Target Market Statement Text

Cancel Save

Success!
Segment successfully added to the CIP

Central Investment Proposition
Central Investment Proposition. Report Duplicate

Platforms 8	Last Modified 12 May 2022, 12:02	Last Modified By Amy Paulsen	Off Platform 8	Last Modified 12 May 2022, 12:07	Last Modified By Amy Paulsen	Portfolios 1	Last Modified 12 May 2022, 12:09	Last Modified By Amy Paulsen	Segments 1	Last Modified 12 May 2022, 12:33	Last Modified By Amy Paulsen
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Platforms Off Platform Products Portfolios Fund Lists Segments

Add New Segment

Segment 1 Test.

Investor Type: Retail

Knowledge & Experience: Basic Investor

Edit

Segment Details - Segment 1 Test.

Platforms Off Platform Products Portfolios Fund Lists Adviser Fees Assign Users

What's shown here

Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-post reviews.

Add / Remove Platforms in CIP from Segment

Platforms Available in CIP

- Aegon Platform
- AEGON Retirement Choices
- AJ Bell Investcentre
- Aviva Wrap
- Elevate
- Embark Platform

Platforms in Segment

This article is a continuation of [Central Investment Proposition - Adding On Platforms to a Segment](#)