

Central Investment Proposition - Adding Portfolios to a Segment

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To add Portfolios to a Segment within the Central Investment Proposition click into **Portfolios**

The screenshot shows the 'Segment Details - Segment 1 Test' page. At the top, there are navigation tabs: 'Platforms', 'Off Platform Products', 'Portfolios', and 'Fund L'. The 'Portfolios' tab is highlighted with a mouse cursor. Below the tabs, there is a blue button labeled 'Add / Remove Portfolios in the CIP from the Segment'. The main content area is divided into two columns. The left column contains a card for 'Segment 1 Test' with details like 'Investor Type: Retail' and 'Knowledge & Experience: Basic Investor'. The right column contains a section titled 'Add / Remove Portfolios in the CIP from the Segment' with a sub-section 'Portfolios Available in CIP' listing 'AJ Bell Active MPS 2' and an empty 'Portfolios in Segment' box.

Move one or more portfolios by clicking on the portfolios you would like to add to the segment.

Once selected, click the arrow to move the portfolio over to **Portfolios in Segment**

This screenshot shows the same 'Segment Details - Segment 1 Test' page, but with more content visible. The 'Portfolios Available in CIP' list now includes 'AAP Balanced S Acc', 'AJ Bell Active MPS 2', 'Balanced Index', 'Balanced Passive+', and 'BNY Mellon Sustainable Global Equity Income Fund'. A mouse cursor is hovering over 'AAP Balanced S Acc', and a right-pointing arrow is visible next to it, indicating it can be moved to the 'Portfolios in Segment' box.

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

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

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

Move selection to Portfolios in Segment

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

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

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

- AAP Balanced S Acc

Multiple portfolios can be moved at once. Click on the first portfolio, type CTRL A to select all the portfolios in the list.

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

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

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

If you don't wish to move all portfolios, click the first portfolio, hold CTRL and click the remaining portfolios you would like to move.

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

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

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

Move selection to Portfolios in Segment

Once done, move onto [Central Investment Proposition - Adding Fund Lists to a Segment](#)