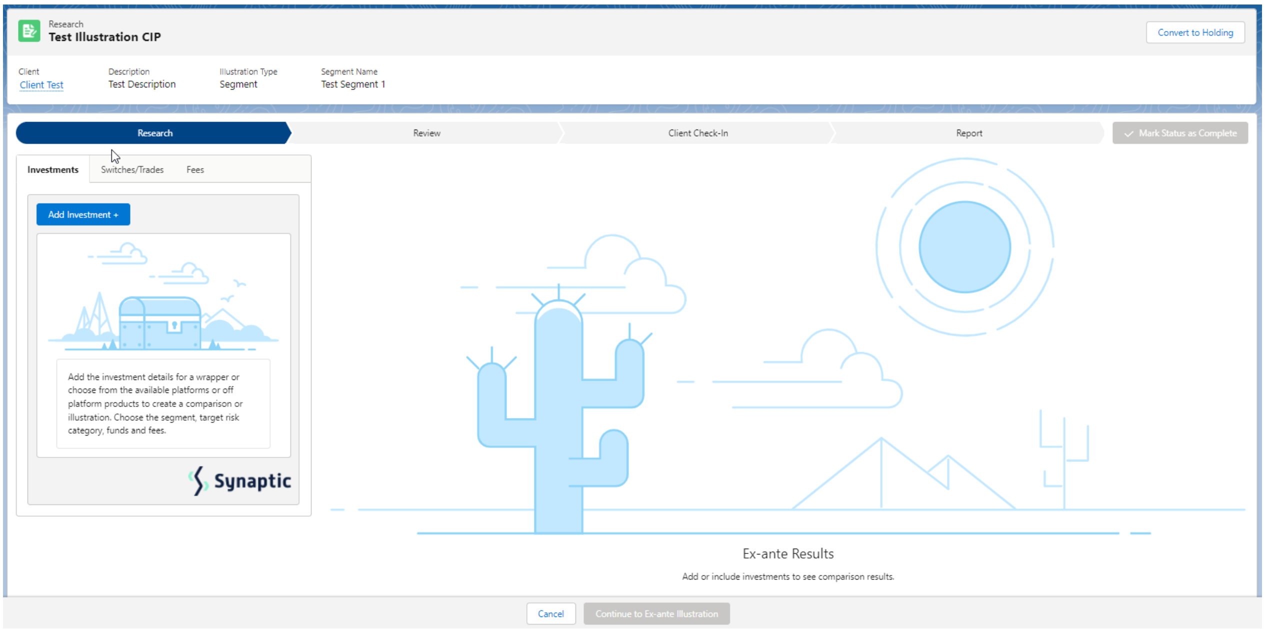
Comparison & Ex-Ante using a CIP - Add Investment

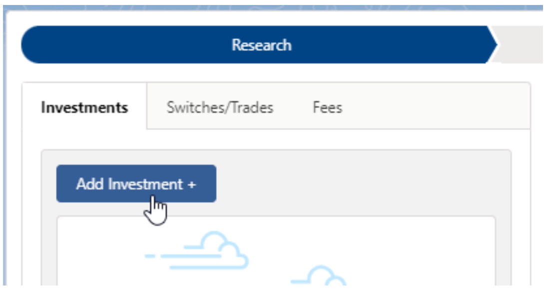
Last Modified on 06/10/2022 4:26 pm BST

This article explains how to add investments to Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup the CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles here.

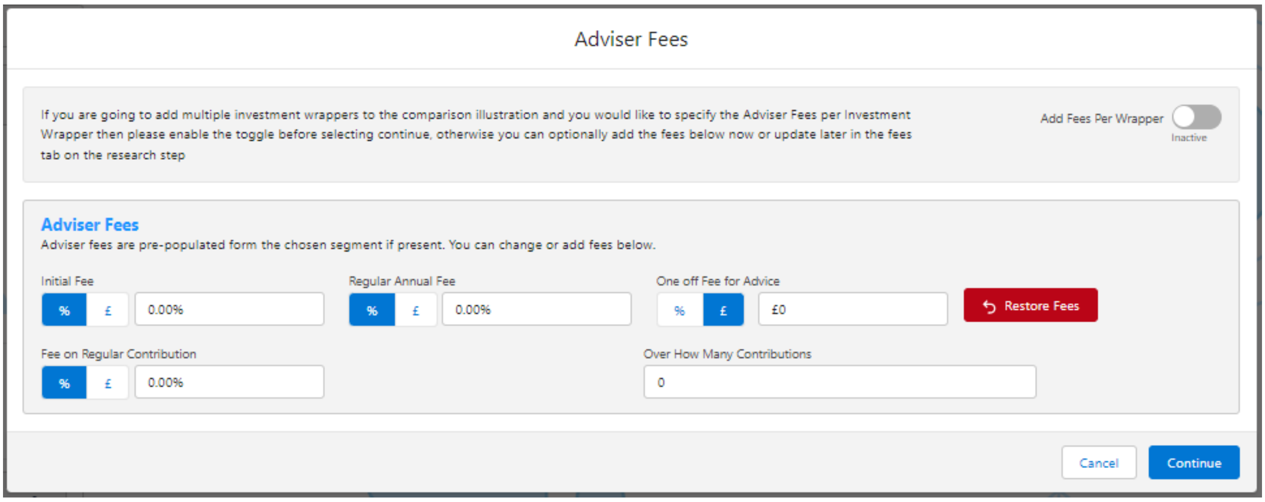
Once the Research has been created, you can start to add Investments to Research. See articles on how to create Research - Comparison & Ex-Ante using a CIP- Creating through the homepage, Comparison & Ex-Ante using a CIP - Creating in the research tab or Comparison & Ex-Ante using a CIP - Creating research within a client record



Add investment through the **Add Investment +** button:

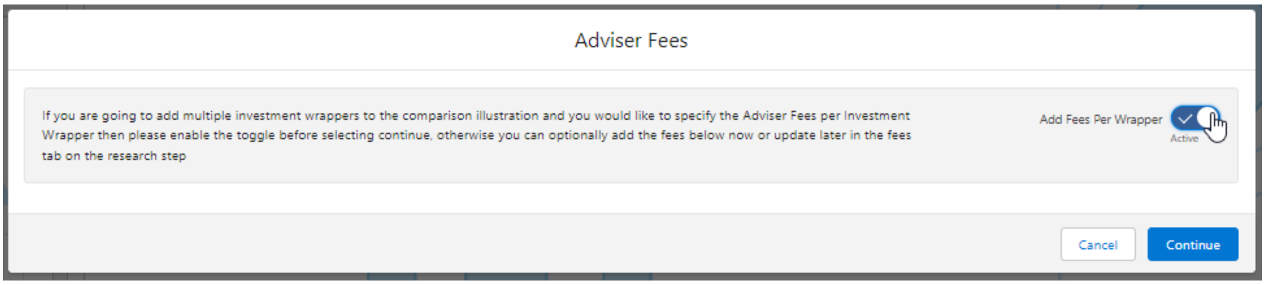


An Adviser Fees box will appear:



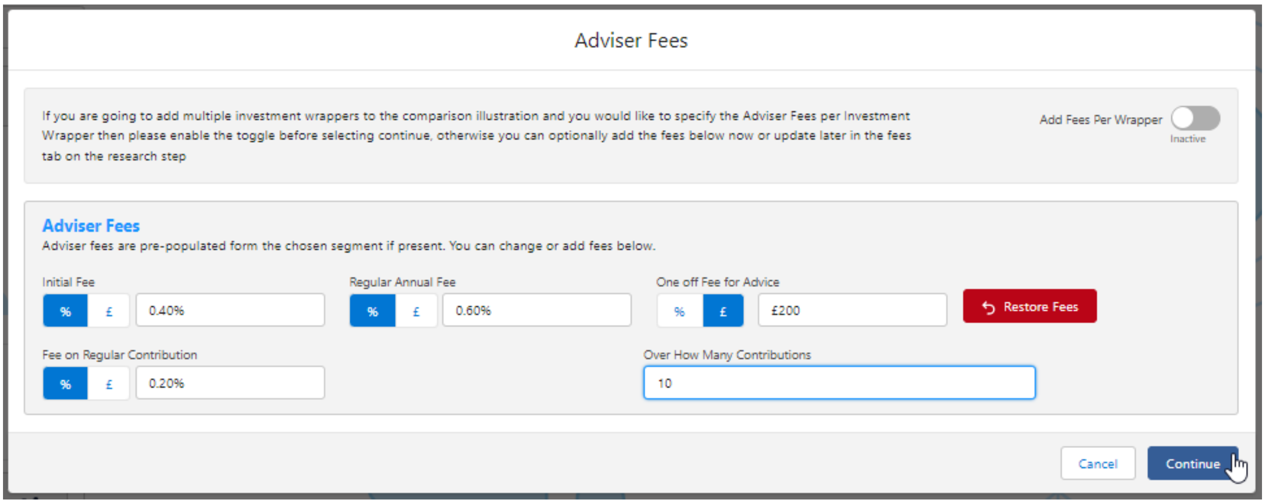
If you are going to add multiple investments to the comparison, you can either specify you would like to set fees by individual investment or by research.

Add Fees Per Wrapper will allow you to enter the adviser fees against the individual investment.

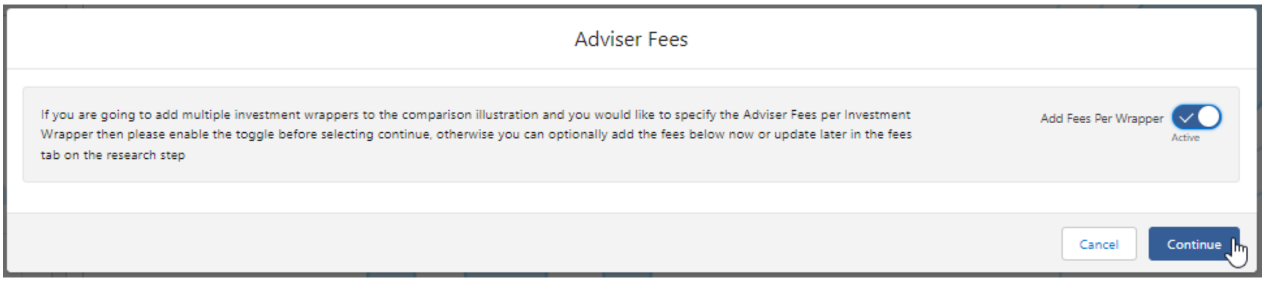


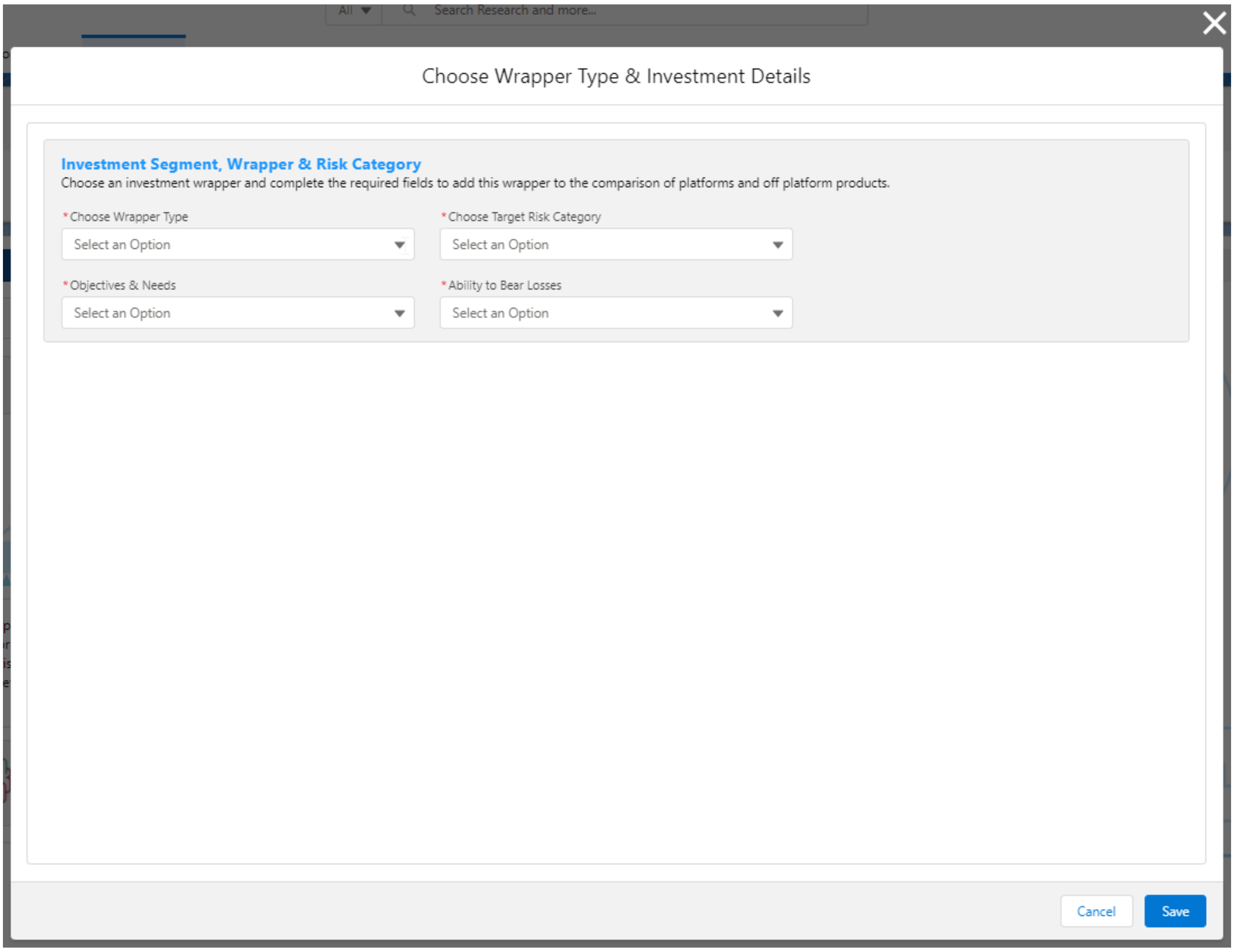
If you would like to apply the fees to the research, enter the details below and **Continue.**

Note: Fees can be updated in the Fees tab in the research.

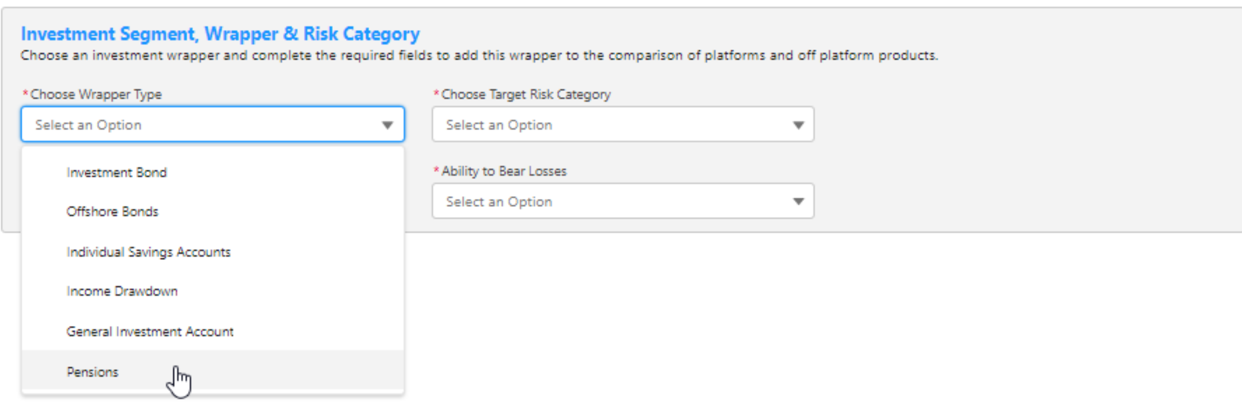


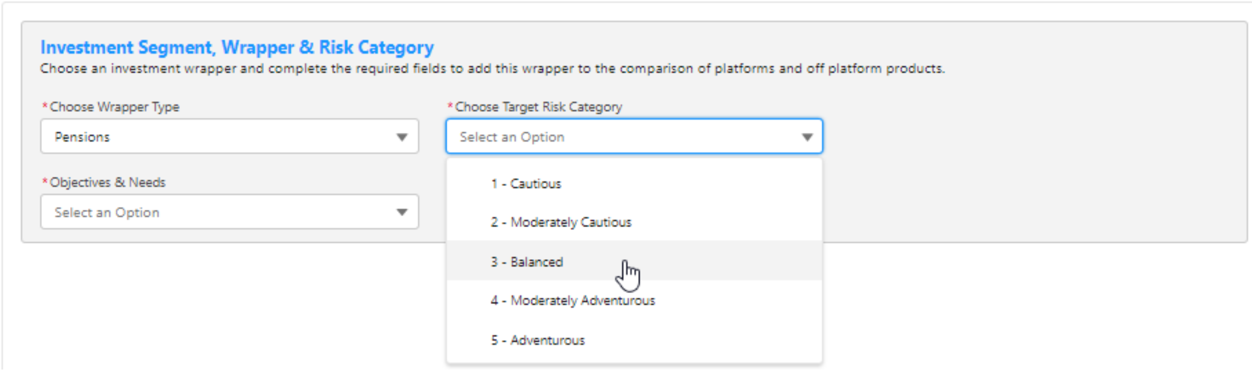
For this example, we will add the fees per individual investment.

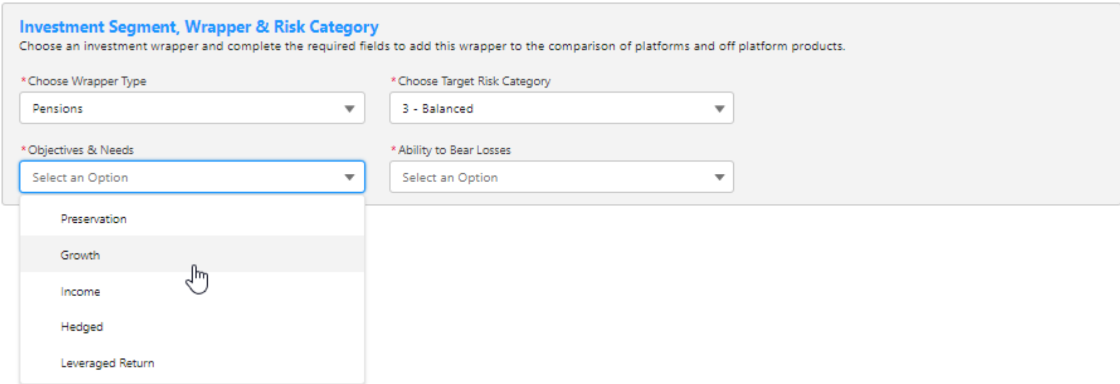


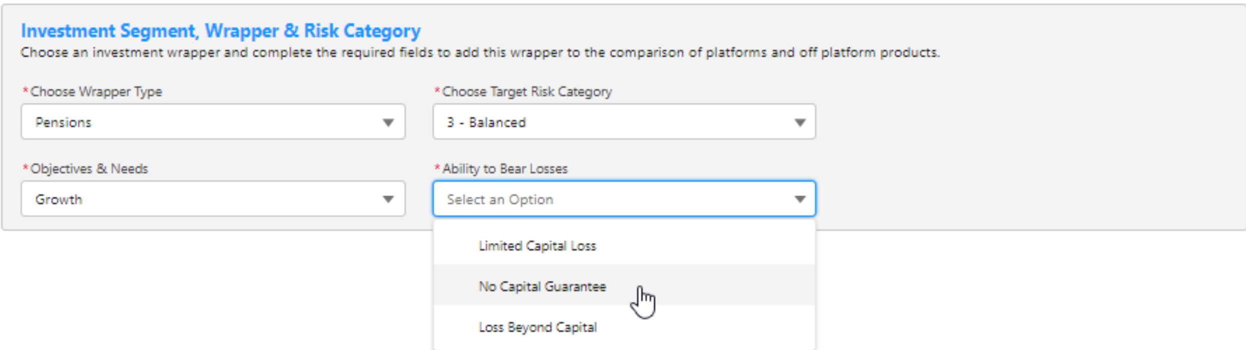


Complete the **Wrapper Type, Target Risk Category, Objective & Needs** and **Ability to Bear Losses:**

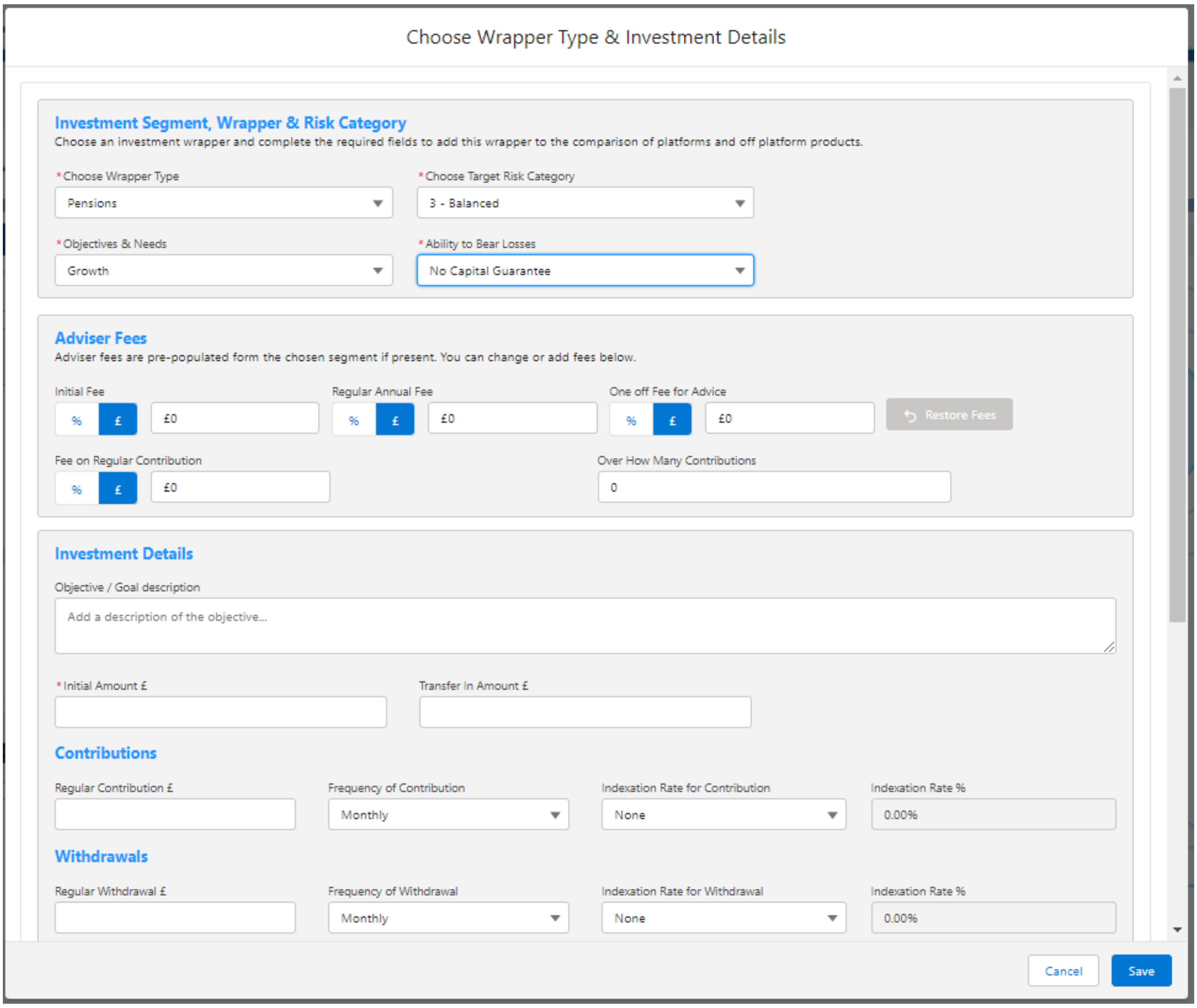






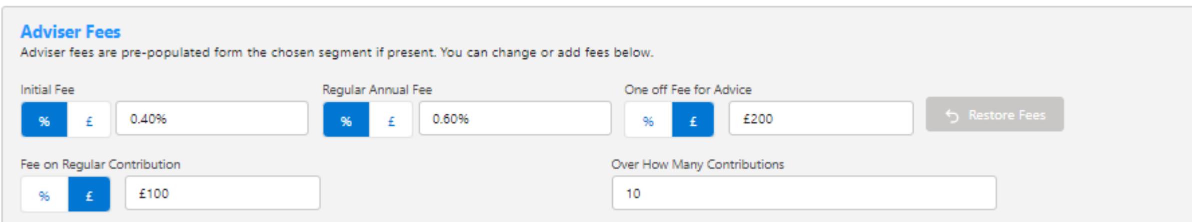


Once all fields have been completed, further detail will appear below:

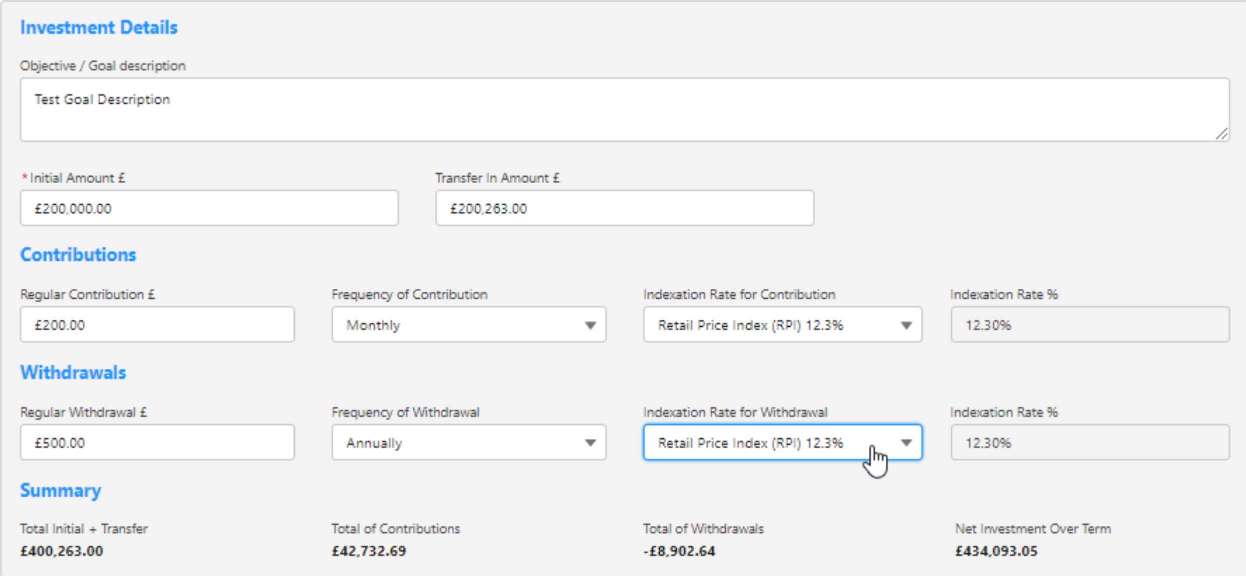


Complete the **Adviser Fees** area:

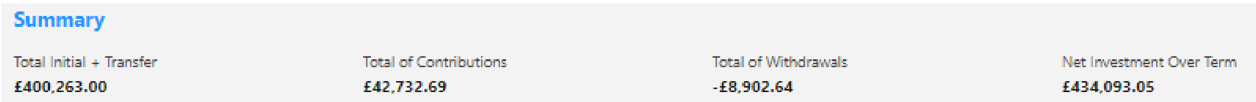
Note: Fees will be pre-populated if using a segment. If any changes are made, **Restore Fees** will revert the values back to what has been set in the segment. If completing whole of market research, the **Restore Fees** button will be greyed out.



Enter the **Investment Details.**

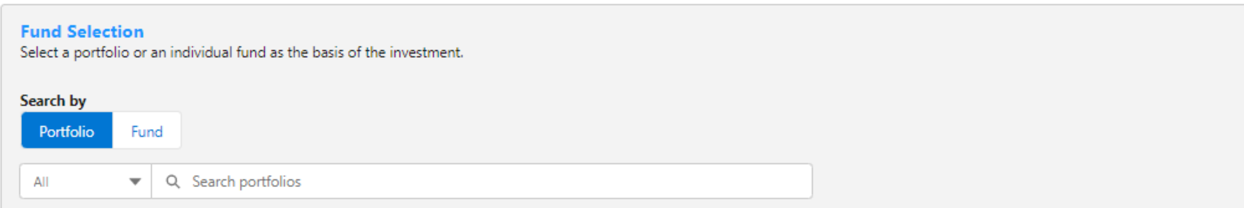


Once entered, a summary will be calculated:

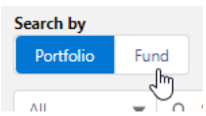


Select the **Portfolio** or **Fund** in the **Fund Selection** area.

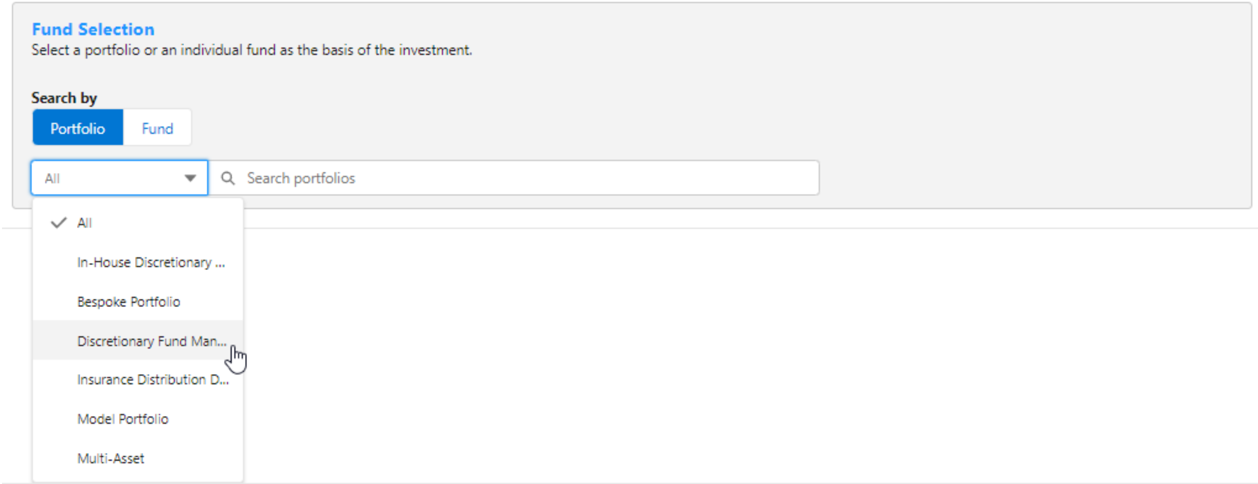
Please note - As we have selected a segment, only funds and portfolios configured in the CIP will be returned. If nothing is returned, check that the fund/portfolio has been added to the CIP and assigned to the chosen segment. See articles Central Investment Proposition - Adding Portfolios, Central Investment Proposition - Adding Fund Lists, Central Investment Proposition - Adding Portfolios to a Segment & Central Investment Proposition - Adding Fund Lists to a Segment.



Choose between **Portfolio** or **Fund**

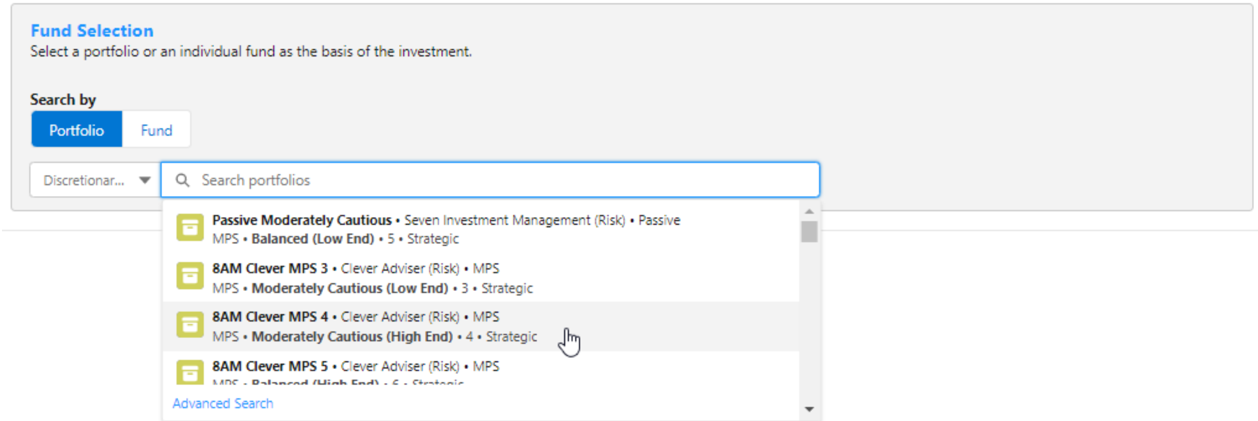


If Portfolio is selected, you are able to select the type of portfolio in the **All** drop down:

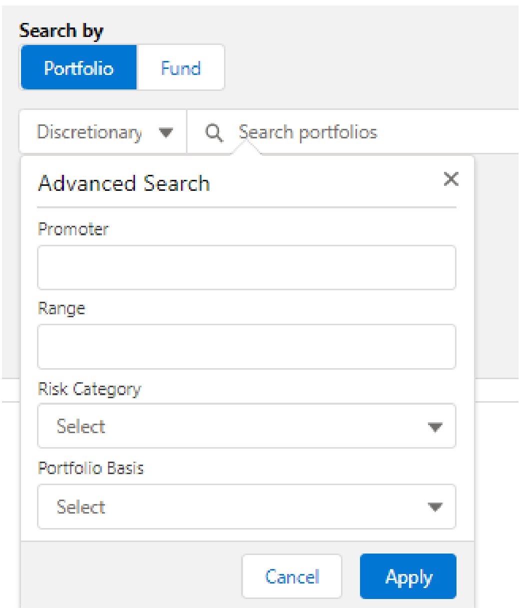


In this example, we have selected **Discretionary Fund Managers.**

When searching, only Portfolios offered by Discretionary Fund Managers will be returned:



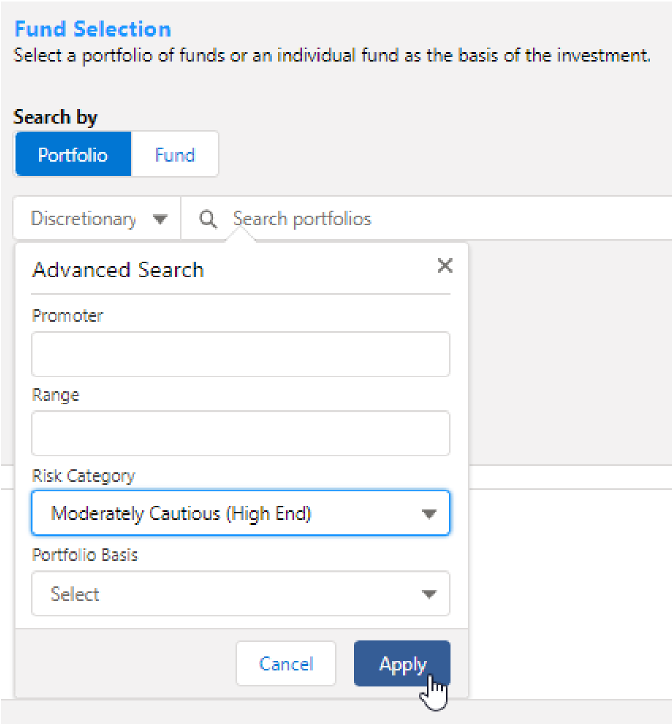
Advanced Search allows you narrow the search by **Promoter, Range, Risk Category** & **Portfolio Basis:**

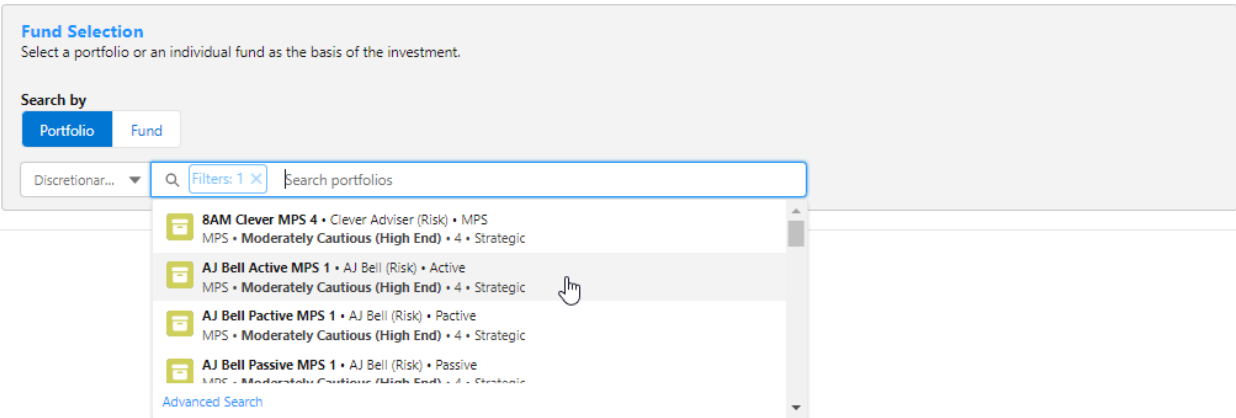


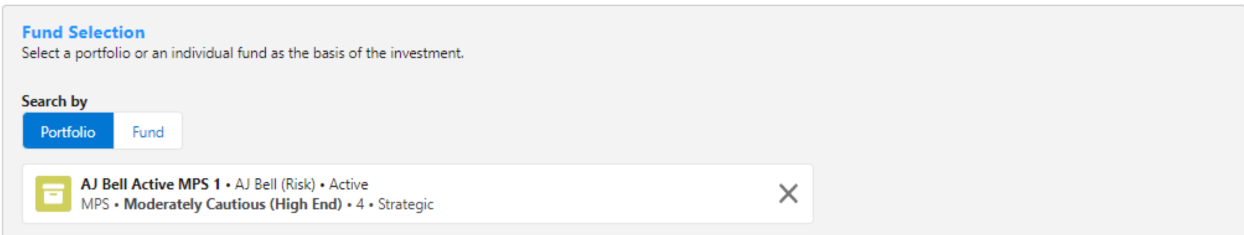
If **Risk Category** is set, this will return DFM portfolios with a risk rating of **Moderately Cautious**

(High End).

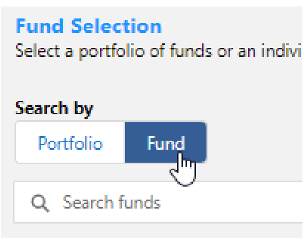
Click **Apply**:



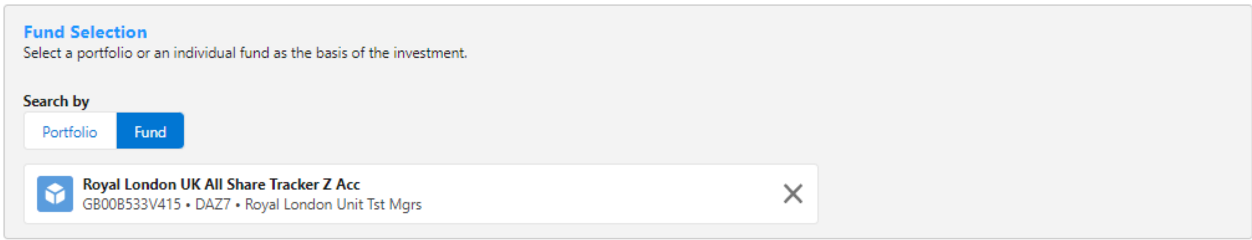




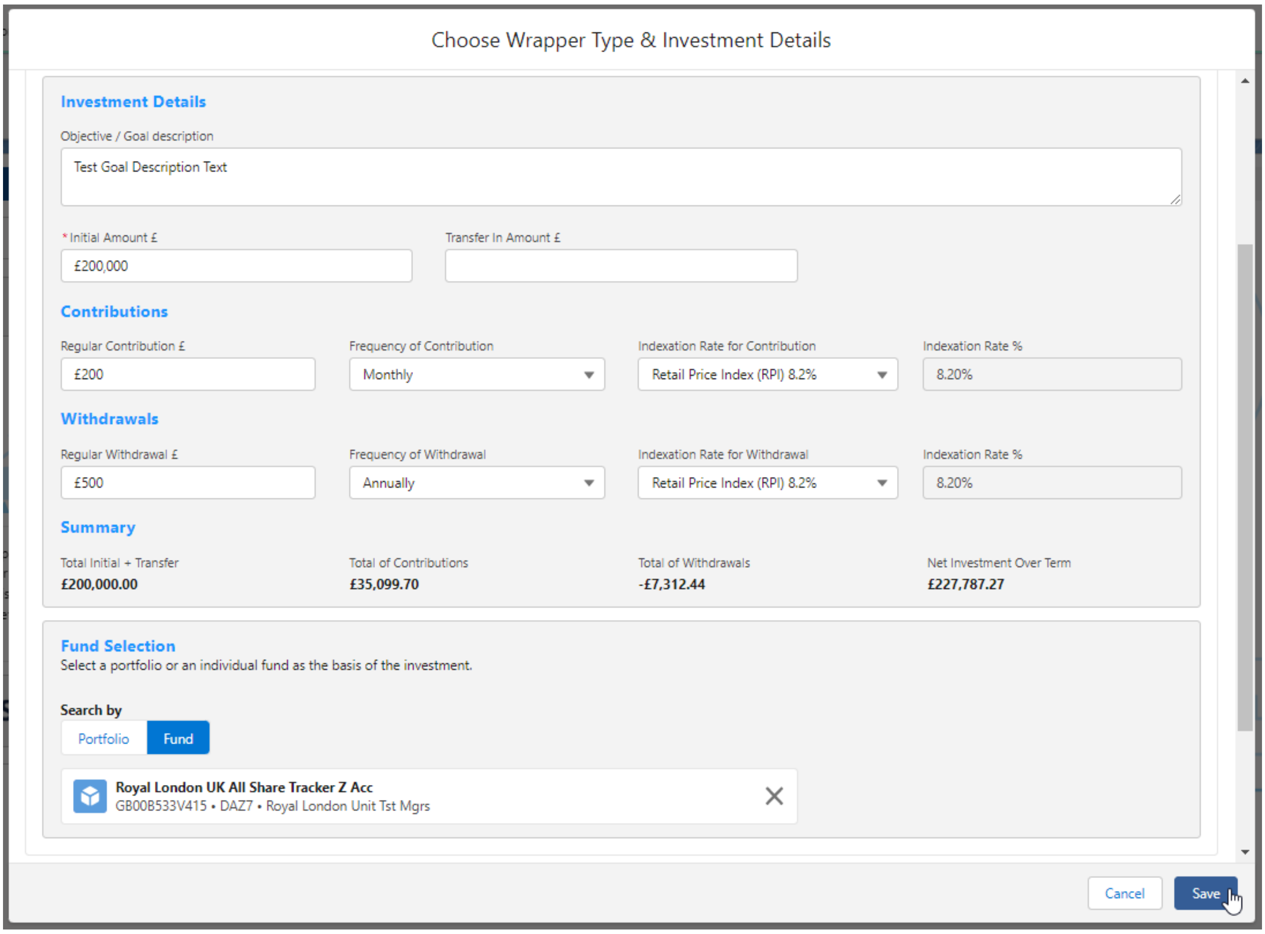
If selecting a fund, click **Fund**:



Search for funds using the fund name or fund code:



Once done, click **Save**



Once saved, the results will be displayed. Please note - As we have used a Central Investment Proposition and selected a segment, only platforms, off platform products, portfolios and funds configured in the CIP will pull through.