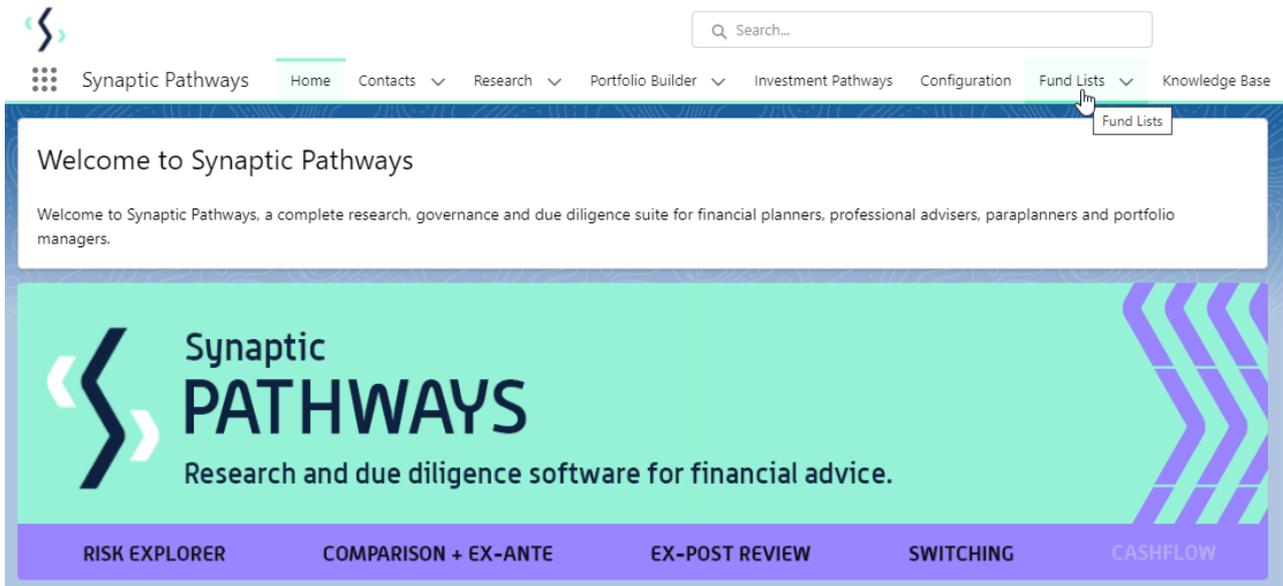


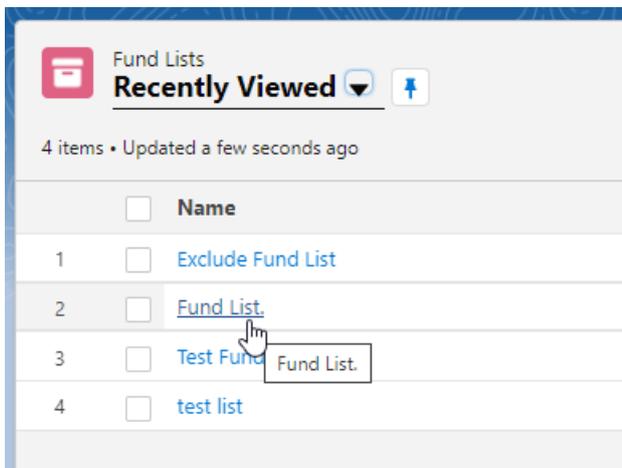
Fund Lists - Import

Last Modified on 26/05/2022 1:09 pm BST

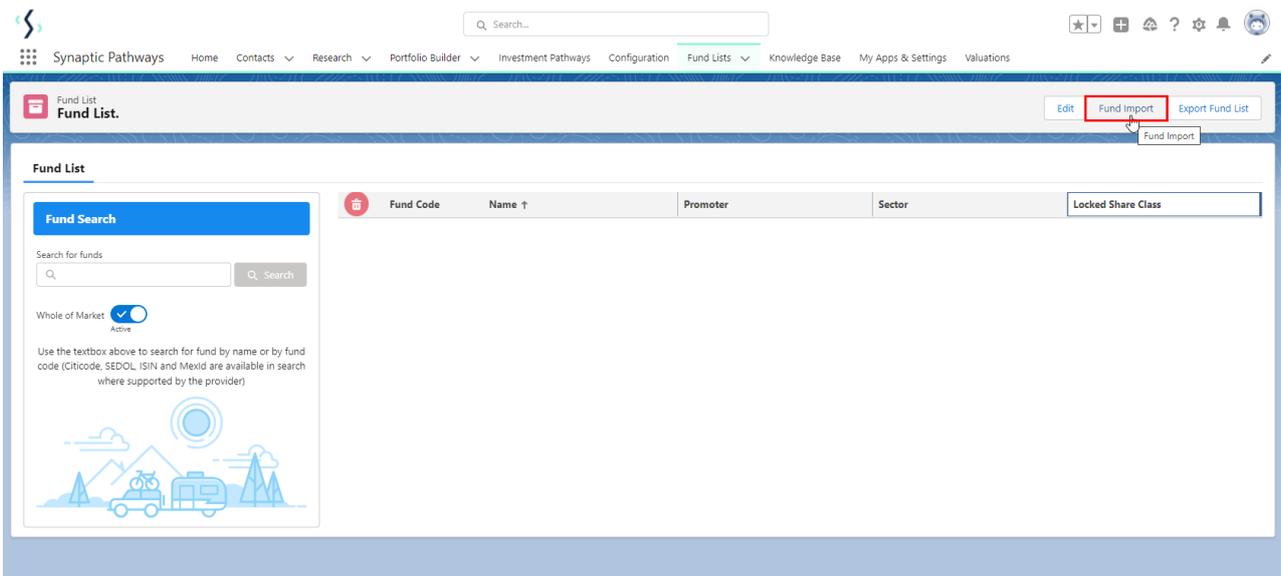
Funds can be imported into Fund lists within the **Fund Lists** tab:



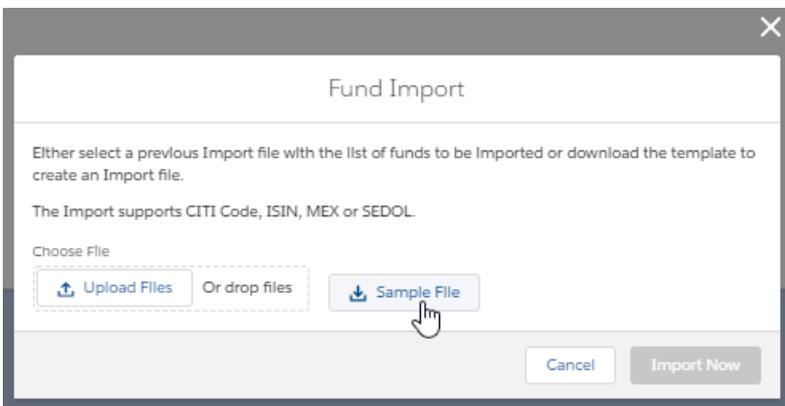
Click into the Fund list or create new:



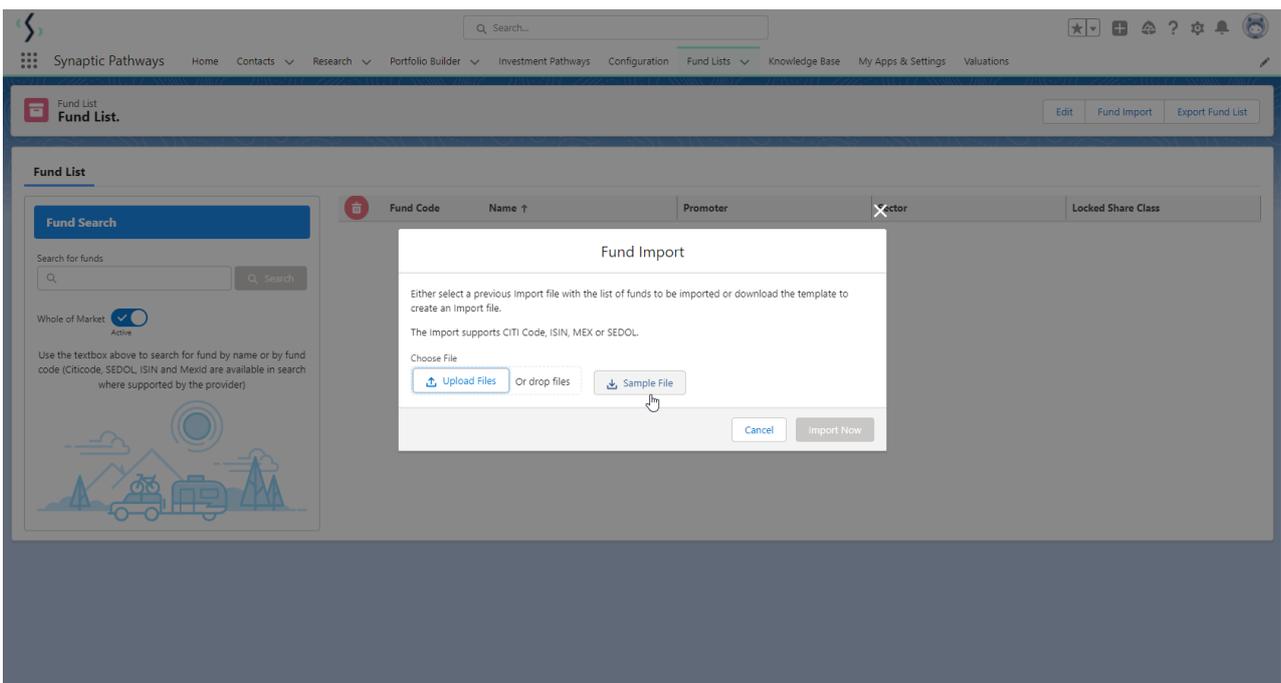
Click 'Fund Import' in the top right of the screen:



Click 'Sample File' to download the template file:



Open the file to input the funds into the Default Fund List (you may need to navigate to your download folder)



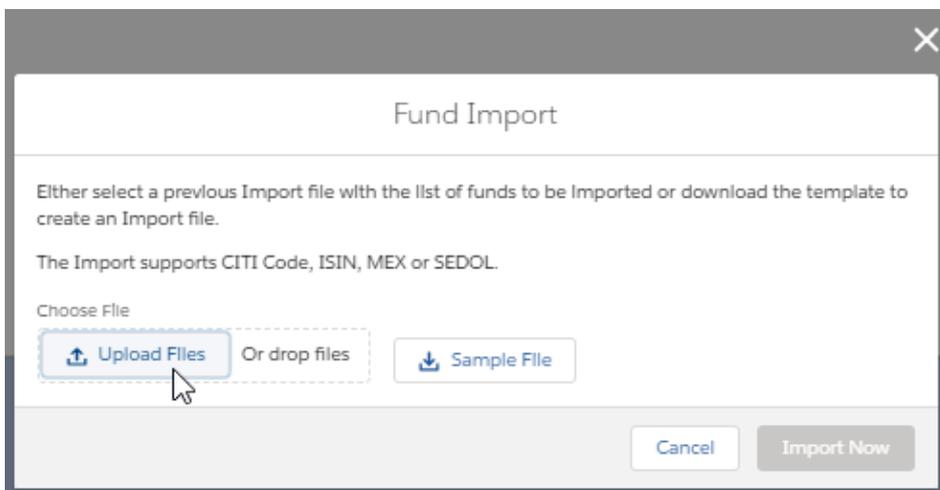
Once open, you will need to list the codes (citicode, ISIN, MexID or Sedol is supported)

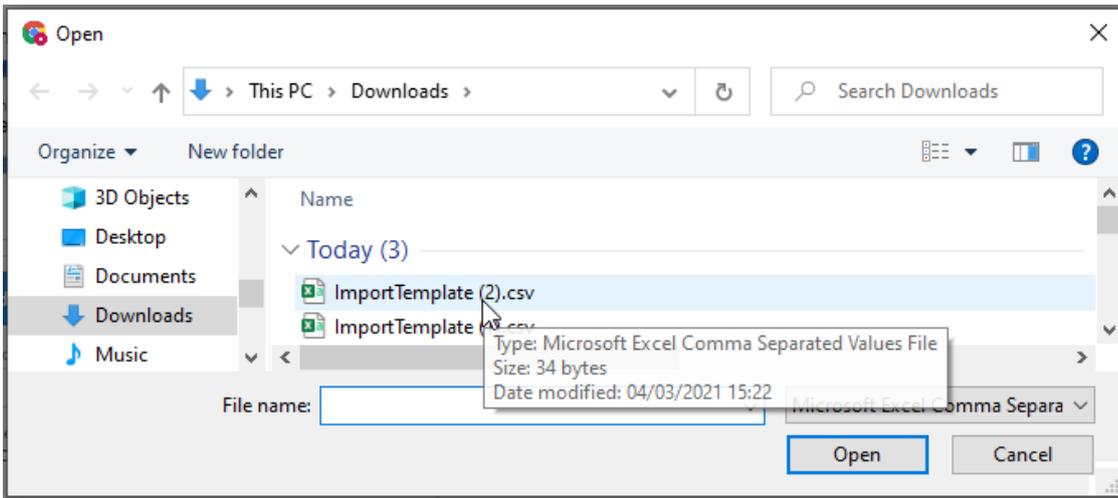
	A	B	
1	FUNDCODE		
2			
3			
4			
5			
6			
7			
8			
9			

	A	
1	FUNDCODE	
2	E184	
3	PE12	
4	ACDO	
5	F1FS	
6		

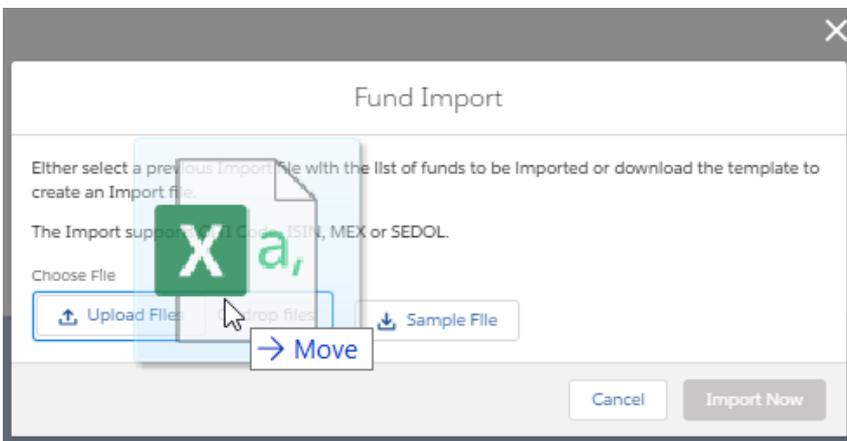
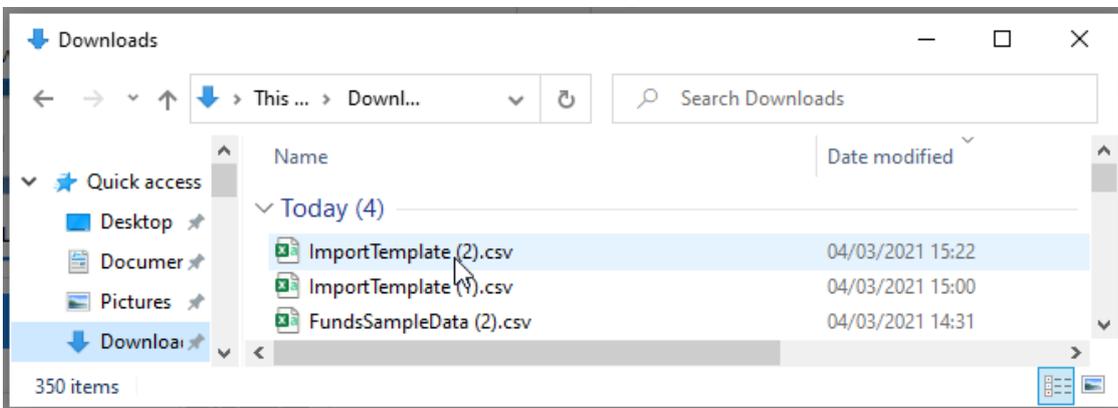
Once done, Save the file. Navigate back to Risk Explorer to import.

You can click 'Upload Files' to find the file:

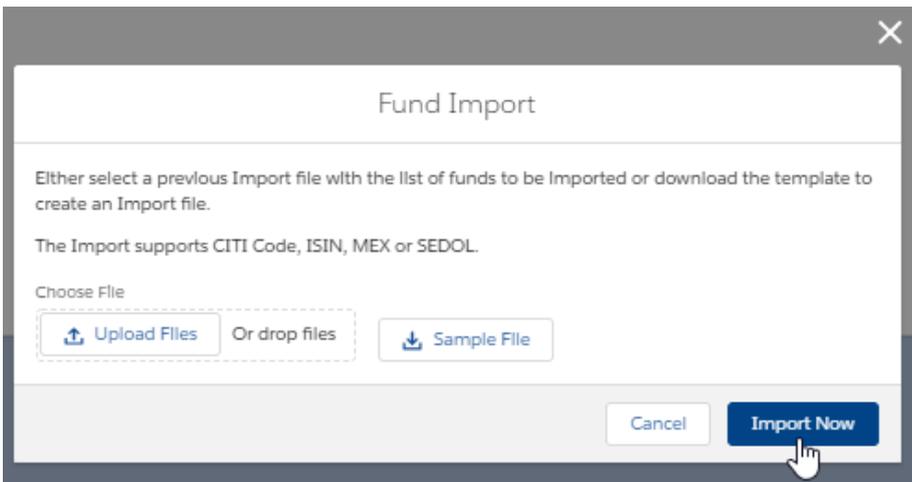




Alternatively, you can drag the file into the Fund Import box:



Click 'Import Now' to import the fund list:



All funds will now be listed, as seen below:

Fund List

Success
Fund have been successfully imported

[Edit](#) [Fund Import](#) [Export Fund List](#)

Fund Code	Name ↑	Promoter	Sector	Locked Share Class
BFB9	7IM AAP Adventurous C Acc	7IM Investment Funds	Mixed Asset - Aggressive	🔒
00P8	BlackRock Cash D Acc	BlackRock	Currency - Sterling	🔒
GRPD	FP Russell Investments Multi Asset Gro...	FP Russell	Mixed Asset - Flexible	🔒
O3QB	HSBC Global Strategy Conservative Port...	HSBC Gbl	Mixed Asset - Cautious	🔒
J84S	L&G Multi-index 4 I Acc	Legal & General UT Mgr Ltd	Mixed Asset - Balanced	🔒
JMLQ	Liontrust MA Passive Intermediate S Acc	Liontrust	Mixed Asset - Balanced	🔒
ACDQ	Vanguard LifeStrategy 60% Equity A Acc	Vanguard Investments UK Limite	Mixed Asset - Aggressive	🔒

Fund Search

Search for funds

Whole of Market Active

Use the textbox above to search for fund by name or by fund code (Citicode, SEDOL, ISIN and Mexid are available in search where supported by the provider)