

Risk Rate Holding

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This article is a continuation of [Off-Platform Holdings - Performance](#)

Risk rate a holding through the **Risk Rate Holding** button at the top right of the screen:

The screenshot shows the user interface for a holding named "Aegon One Retirement | Fully Insured". At the top right, there are buttons for "Risk Rate Holding", "Review", "Edit", and "Delete". The "Risk Rate Holding" button is highlighted with a mouse cursor. Below the header, there is a summary bar with "Client: Test Client", "Current Value: £234,000.00", and "Current Risk Rating". The main content area is divided into sections: "Details" (with tabs for Underlying Assets, Performance, and History), "Contributions (1)", "Weighting By Funds" (a donut chart showing 57.69% in Vanguard LifeStrategy 60% Equity A Acc and 42.31% in 7IM AAP Adventurous C Acc), and "Performance Chart" (a line graph showing a single data point at 250k).

A modal dialog box is displayed with the text "Calculating risk rating." and a loading spinner consisting of five blue dots arranged in a circle. The dialog box has a close button (X) in the top right corner.

A green success message banner is displayed with a checkmark icon on the left and a close button (X) on the right. The text reads "Success! Risk rating calculated successfully!".

Once risk rated, the rating can be found next to the current value at the top of the screen:

The screenshot shows the updated holding header and summary bar. The holding name is "Aegon One Retirement | Fully Insured". The summary bar now shows "Client: Test Client", "Current Value: £234,000.00", and "Current Risk Rating: 4 | Moderately Adventurous".

For further information on Holdings, see article [Creating a Platform Holding](#)

