Platform Holdings - Underlying Assets

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This article is a continuation of Platform Holdings - Holdings

To add underlying assets to a holding, click into the Underlying Assets tab:

Click **New**

Complete the details of the asset.

Either leave Underlying asset type to **All** or use the drop down to narrow the search:

New Underlying Asset

Select an Underlying asset type

All ▼

🔍 Search Name | 🔍 Search | ⓘ

Number of Units

Enter the number of units

*Value

Enter the value of the asset

Valuation Date

📅

Cancel | Save & New | Save

New Underlying Asset

Select an Underlying asset type

All ▼

✓ All

Funds

Discretionary Fund Managers

Insurance Distribution Directive

Multi-Asset

Cash

Valuation Date

📅

Search for the asset using either Citicode, SEDOL, ISIN, and MexID (where supported by the provider)

As you enter the units, the value will automatically calculate.

If you would prefer to enter the value, it will automatically calculate the units:

Once complete, **Save**

Once saved you will be taken to the holding detail screen. The holding now reflects the asset details:

For further information on Holdings, see articles Platform Holdings - Contributions