

Why is the Portfolio Fact sheet 'view' button greyed out in the Compliance Details tab?

Last Modified on 13/02/2024 3:35 pm GMT

The 'View' button is greyed out if you have selected a portfolio from our Discretionary Fund Managers, Multi-Assets & Insurance Distribution Directives. A fact sheet will not be available.

Only Model & Bespoke Portfolios you have created will have a fact sheet.
