

Investment Pathways - Model, Bespoke & In-House Discretionary Portfolios

Last Modified on 19/02/2024 6:27 pm GMT

You can create/view portfolios within **Portfolio Builder** (As seen in article [Portfolio Builder - Creating a Portfolio](#)) or within **Investment Pathways**.

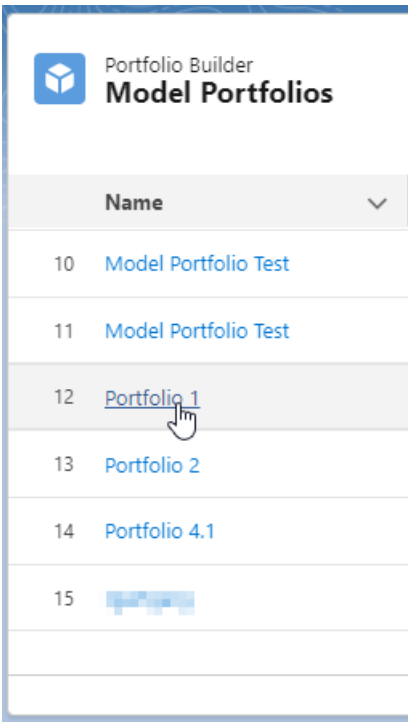
This article will take you through the **Investment Pathways** area.

Portfolio Builder Model Portfolios								
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1	Adventurous	Yes	6	Balanced (High End)		Private	11/02/2022, 15:46	Valid
2	Another Example	Yes	7	Moderately Adventurous (Lo...		Private	22/03/2022, 10:33	Valid
3	Blake	Yes	8	Moderately Adventurous (Hig...		Private	16/12/2021, 14:01	Valid
4	CIP 2	Yes	7	Moderately Adventurous (Lo...		Private	01/04/2022, 15:57	Valid
5	CIP 2 - 2022	Yes				Private	01/04/2022, 15:58	Requires Attention
6	David	Yes	8	Moderately Adventurous (Hig...		Private	10/02/2022, 14:23	Valid

Portfolio Builder Bespoke Portfolios								
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1	11212	Yes	7	Moderately Adventurous (Lo...		Private	09/12/2021, 11:40	Valid
2	AA Portfolio	Yes				Private	20/04/2022, 12:34	Valid
3	AC Demo	Yes	8	Moderately Adventurous (Hig...		Private	02/03/2022, 11:42	Valid
4	AH Demo	Yes	7	Moderately Adventurous (Lo...		Private	22/03/2022, 15:16	Valid
5	Alex	Yes	7	Moderately Adventurous (Lo...		Private	22/11/2021, 13:08	Valid
6	Andy 2	Yes	9	Adventurous		Private	19/10/2021, 10:58	Valid

Portfolio Builder In-House Discretionary Portfolios								
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status	
1	Amy's IHDFM	Yes	5	Balanced (Low End)		Public	29/03/2022, 15:20	Valid
2	CIP Balanced	Yes	5	Balanced (Low End)	Balanced	Private	21/04/2022, 15:39	Valid
3	IHD - Portfolio 1	Yes	6	Balanced (High End)		Private	21/03/2022, 09:17	Valid
4	IHD Test Portfolio	Yes	7	Moderately Adventurous (Lo...		Private	31/03/2022, 16:10	Valid
5	MH Test IHD	Yes	6	Balanced (High End)		Private	05/05/2022, 10:56	Valid
6	My INHDM	Yes	5	Balanced (Low End)		Private	19/04/2022, 15:56	Valid

Click into the portfolio to view details:



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Portfolio 1 Duplicate Portfolio Import Funds Edit

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Fund Search

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Fund Table

Fund Code	Fund Name	Promoter	Asset Allocation	Weighting %
GMUI	Fidelity Global Property W Acc	Fidelity International (FIL In	<input checked="" type="checkbox"/>	50
DAZ7	Royal London UK All Share Tracker Z Acc	Royal London Unit Tst Mgrs	<input checked="" type="checkbox"/>	50
			Cash	0

Remaining allocation: 0%
Total allocation: 100%

Portfolio Summary

Risk Profile Category: **Moderately Adventurous (Low End)** Risk Rating: **7**

Minimum Gain in any 1 Year: **-18.09% or -£1,809.00**

Average Gain in any 1 Year: **3.69% or £369.00**

Maximum Gain in any 1 Year: **22.96% or £2,296.00**

The bar chart displays the minimum, mean and maximum gain values as a percentage for the portfolio.

About the Fund Search

The Fund Universe is sourced from FE fundinfo Limited and from a range of Fund Promoters who have authorised Synaptic Software Limited to distribute.

FE fundinfo information in this service is updated on a daily basis.

Use of SEDOL Masterfile®, if you search for funds based on

For further information on creating a portfolio, see article [Portfolio Builder - Creating a Portfolio](#).