

Investment Pathways

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

The Investment Pathways tab contains the Central Investment Proposition, view Discretionary Fund Managers, Multi-Asset, Model Portfolios, Insurance Distribution Directives and Bespoke Portfolios:

The screenshot displays the Synaptic Pathways application interface. At the top, there is a navigation bar with the Synaptic Pathways logo and a search bar. The main content area is divided into several sections:

- Central Investment Proposition:** A table listing various investment propositions with columns for Name, Description, Active status, Last Modified, and Owner.
- Discretionary Fund Managers:** A table listing fund managers with columns for Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date.
- Multi-asset:** A table listing multi-asset portfolios with columns for Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date.
- Insurance Distribution Directive:** A table listing insurance distribution directives with columns for Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date.

Each table includes a 'Filter by Synaptic Risk Rating' dropdown and a 'Search by Name, Promoter or Range' search bar.

Portfolio Builder									
Model Portfolios									
Search by Name or Range									
Q Search this list...									
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status		
1	Amy Test Portfolio 0709	Yes	2	Moderately Cautious		Private	13/09/2023, 11:35		Valid
2	asset base - Balanced	Yes	3	Balanced		Public	16/12/2022, 08:55		Valid
3	Aviva Query	Yes	4	Moderately Adventurous		Private	29/06/2023, 10:13		Valid
4	BCR ADV Q4 2022	Yes	4	Moderately Adventurous		Private	19/10/2022, 11:07		Valid
5	BFB9	Yes	3	Balanced		Private	08/12/2022, 16:44		Valid
6	Brendan portfolio	Yes	4	Moderately Adventurous		Private	05/09/2022, 15:21		Valid
7	Brendan	Yes	6	Moderately Adventurous		Private	10/11/2022, 09:20		Valid

Portfolio Builder									
Bespoke Portfolios									
Search by Name or Range									
Q Search this list...									
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status		
1	10fz	Yes	4	Moderately Adventurous		Private	08/07/2022, 11:59		Valid
2	13a1	Yes	2	Moderately Cautious		Private	01/11/2023, 09:58		Valid
3	75 Demo	Yes	3	Balanced		Private	25/10/2022, 15:22		Valid
4	7IM AAP Adventurous C Acc	Yes	4	Moderately Adventurous		Private	12/04/2023, 10:46		Valid
5	7im portfolio	Yes	4	Moderately Adventurous		Private	10/08/2022, 16:18		Valid
6	AA Based	Yes	2	Moderately Cautious		Private	16/08/2022, 10:39		Valid
7	AA Based	Yes	2	Moderately Cautious		Private	16/08/2022, 10:39		Valid

Portfolio Builder									
In-House Discretionary Portfolios									
Search by Name or Range									
Q Search this list...									
Name	Active	Risk Rating	Risk Category	Range	Availability	Last Modified	Status		
1	AA Based	Yes	3	Balanced		Public	14/09/2022, 12:23		Valid
2	AA Based	Yes	2	Moderately Cautious		Private	28/07/2022, 13:27		Valid
3	AA Based	Yes	3	Balanced		Private	25/08/2022, 13:24		Requires Attention
4	AA Based	Yes	3	Balanced		Private	20/07/2022, 13:45		Valid
5	AA Based	Yes	3	Balanced		Private	04/10/2022, 12:07		Requires Attention
6	AA Based	Yes	4	Moderately Adventurous		Private	18/08/2022, 12:45		Valid
7	AA Based	Yes	2	Moderately Cautious		Private	16/08/2022, 10:39		Valid

For further information about this area, please see the following articles:

[Investment Pathways](#)

[Investment Pathways - Discretionary Fund Managers, Multi-Asset & Insurance Distribution Directives](#)

[Investment Pathways - Model & Bespoke Portfolios](#)