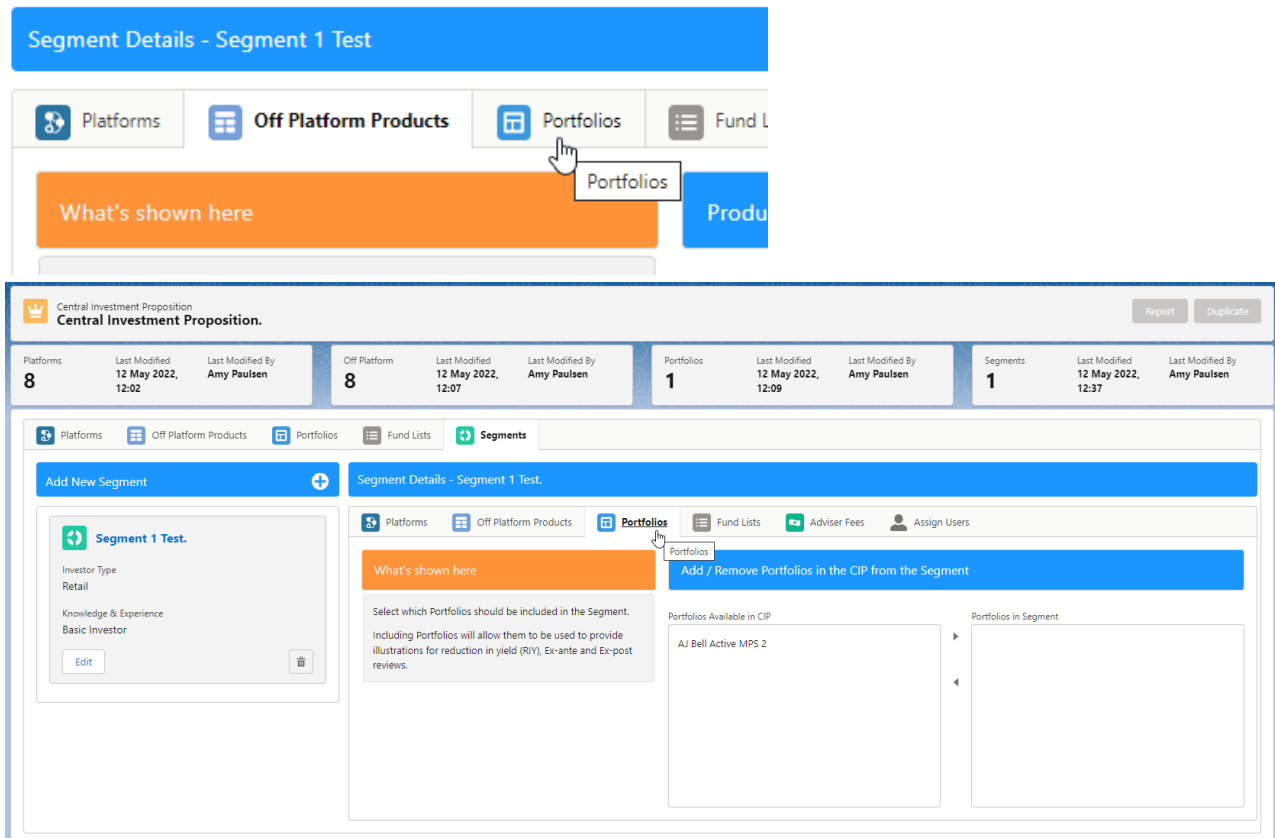


Central Investment Proposition - Adding Portfolios to a Segment

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

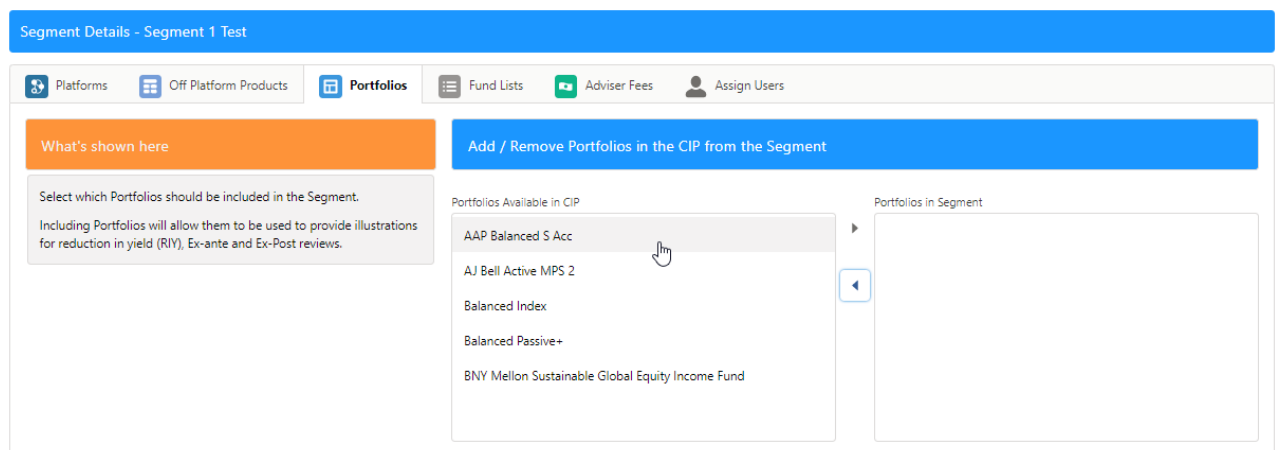
This article is a continuation of [Central Investment Proposition - Adding Off Platforms to a Segment](#)

To add Portfolios to a Segment within the Central Investment Proposition click into **Portfolios**



Move one or more portfolios by clicking on the portfolios you would like to add to the segment.

Once selected, click the arrow to move the portfolio over to **Portfolios in Segment**



Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

Select which Portfolios should be included in the Segment.
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

Move selection to Portfolios in Segment

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

Select which Portfolios should be included in the Segment.
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Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

- AAP Balanced S Acc

Multiple portfolios can be moved at once. Click on the first portfolio, type CTRL A to select all the portfolios in the list.

Segment Details - Segment 1 Test

Platforms Off Platform Products **Portfolios** Fund Lists Adviser Fees Assign Users

What's shown here

Select which Portfolios should be included in the Segment.
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

- AAP Balanced S Acc
- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

If you don't wish to move all portfolios, click the first portfolio, hold CTRL and click the remaining portfolios you would like to move.

What's shown here

Select which Portfolios should be included in the Segment.
Including Portfolios will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.

Add / Remove Portfolios in the CIP from the Segment

Portfolios Available in CIP

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- AJ Bell Active MPS 2
- Balanced Index
- Balanced Passive+
- BNY Mellon Sustainable Global Equity Income Fund

Portfolios in Segment

Move selection to Portfolios in Segment

Once done, move onto [Central Investment Proposition - Adding Fund Lists to a Segment](#)