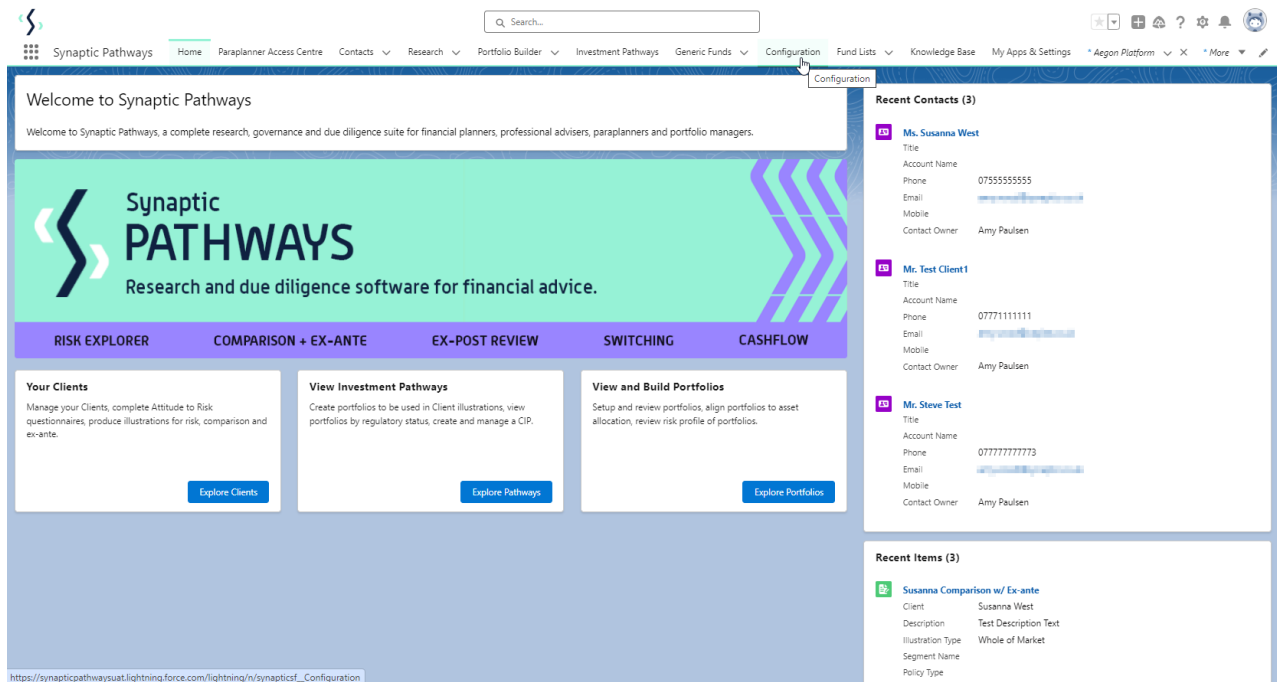


Creating a Central Investment Proposition

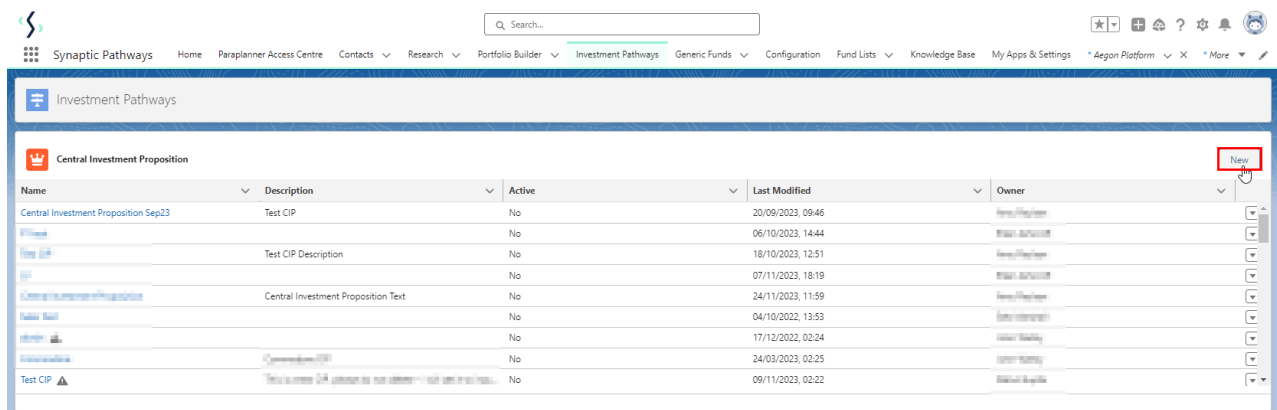
Last Modified on 13/02/2024 3:35 pm GMT

Central Investment Proposition allows you to set what on & off platform products will be available to research, as well as portfolios, fund lists and segments.

They are created within the **Investment Pathways** tab:



Click **New** under **Central Investment Proposition**



Enter the **CIP Name** & **CIP Description**. If you would like the CIP active upfront, tick **Active** (You will need to complete setup of the CIP before conducting research). The CIP can be made active after setup.

New Central Investment Proposition(CIP)

* CIP Name

CIP Description

Mark Active

Save once complete:

New Central Investment Proposition(CIP)

* CIP Name

CIP Description

Mark Active

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Investment Pathways

Success! Central Investment Proposition 'Central Investment Proposition' was created successfully!

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023, 09:46	Ellen Atwood
Test CIP	Test CIP Description	No	18/10/2023, 12:51	Ellen Atwood
Central Investment Proposition	Central Investment Proposition Text	No	24/11/2023, 11:59	Ellen Atwood
Test CIP	Test CIP Description	No	04/10/2022, 13:53	Ellen Atwood
Test CIP	Test CIP Description	No	17/12/2022, 02:34	Ellen Atwood
Test CIP	Test CIP Description	No	24/03/2023, 02:25	Ellen Atwood
Test CIP	Test CIP Description	No	09/11/2023, 02:22	Ellen Atwood

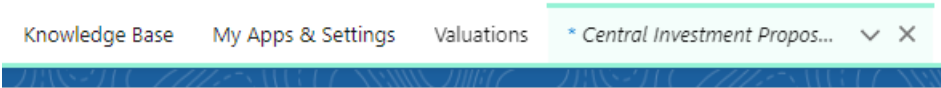
To add details of the CIP, click into the name:

Investment Pathways

Central Investment Proposition New

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023, 09:46	Wendy Pearson
		No	06/10/2023, 14:44	Wendy Pearson
	Test CIP Description	No	18/10/2023, 12:51	Wendy Pearson
		No	07/11/2023, 18:19	Wendy Pearson
Central Investment Proposition	Central Investment Proposition Text	No	24/11/2023, 11:59	Wendy Pearson
	/ra0L4G00002grZsGUAAU	No	04/10/2022, 13:53	John Murphy
		No	17/12/2022, 02:24	John Murphy
	Temporary CIP	No	24/03/2023, 02:25	John Murphy
Test CIP	This is a test CIP. It is used for testing purposes only.	No	09/11/2023, 02:22	Wendy Pearson

The CIP will appear in the navigation bar at the top of the screen:



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Central Investment Proposition Report Duplicate

Platforms	Off Platform	Portfolios	Segments
0	0	0	0

5 Platforms Off Platform Products Portfolios Fund Lists Segments

Choose Platforms to Include

Search by Name

Search and Add Platforms to include in the Central Investment Proposition.

On Platform Product Selected

Investment Platforms

To start entering details into the CIP, see article [Central Investment Proposition - Adding On Platform Products](#)