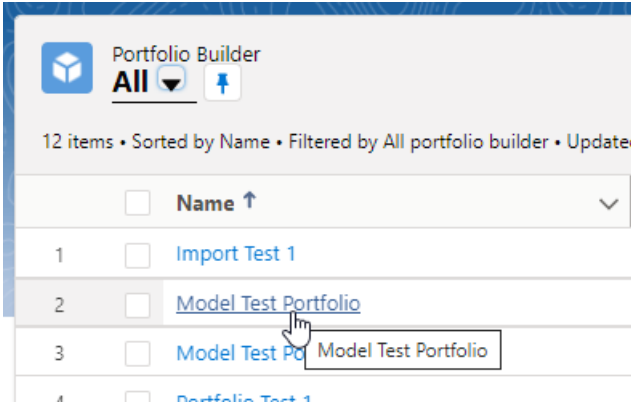


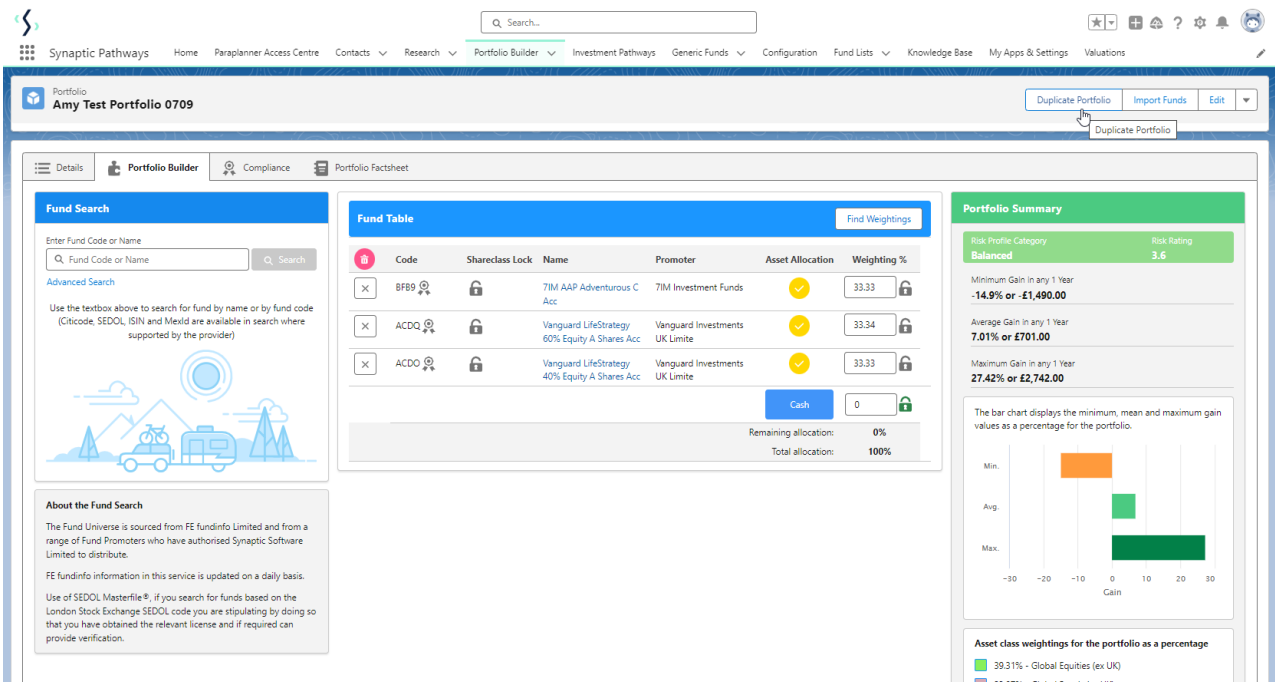
Can I duplicate a portfolio?

Last Modified on 23/04/2024 11:47 am BST

You will need to open the portfolio you would like to duplicate:



Click 'Duplicate Portfolio' in the top right corner:



Complete the details of the new portfolio and 'Save'

Duplicate Portfolio

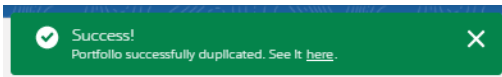
*Portfolio Name

Description

Range

Save

If you would like to go straight into the portfolio you created, click the 'here' link in the success message:



If not, you will remain in the original portfolio.

Navigate back to Portfolio Builder to view your duplicate portfolio:

Portfolio Builder
 All

13 items • Sorted by Name • Filtered by All portfolio builder • Updated a few seconds ago

<input type="checkbox"/>	Name ↑	Risk Name One
1	<input type="checkbox"/> Import Test 1	Balanced
2	<input type="checkbox"/> Model Test Portfolio	Moderately Cautious
3	<input type="checkbox"/> Model Test Portfolio	Moderately Adventurous
4	<input type="checkbox"/> Model Test Portfolio - Copy	
5	<input type="checkbox"/> Portfolio Test 1	Adventurous
6	<input type="checkbox"/> Test Portfolio	Adventurous
7	<input type="checkbox"/> Test Portfolio 1	Moderately Adventurous