

Ex-Post Reviews - Optimise - Investment Details

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Investment Details

In the Investment Details tab you are able to:

- Amend the term
- Select Central Investment Proposition or Whole of Market
- Complete MiFID II Compliance information
- Choose a Risk Category

In this example, we will keep the term the same and will complete the remaining fields:

The screenshot shows the 'Next Period Optimisation' interface with the 'Investment Details' tab selected. The form contains the following fields:

- Term:** Remaining Term (Years / Months) with input fields for 10 and 0.
- Central Investment Proposition:** A dropdown menu labeled 'Choose Segment' with 'Select an Option' displayed. To its right is a toggle switch for 'Use Whole of Market' which is currently 'Disabled'.
- MiFID II Compliance:** Three dropdown menus: 'Objectives & Needs' (Select an Option), 'Ability to Bear Losses' (Select an Option), and 'Risk Category' (2 - Moderately Cautious).

At the bottom right of the form are 'Cancel' and 'Save & Update' buttons.

Once complete, move onto the **Contributions & Withdrawals** tab.

The screenshot shows the 'Next Period Optimisation' interface with the 'Contributions & Withdrawals' tab selected. The form contains the following fields:

- Term:** Remaining Term (Years / Months) with input fields for 10 and 0.
- Central Investment Proposition:** A dropdown menu labeled 'Choose Segment' with 'Select an Option' displayed. To its right is a toggle switch for 'Use Whole of Market' which is currently 'Enabled'.
- MiFID II Compliance:** Three dropdown menus: 'Objectives & Needs' (Growth), 'Ability to Bear Losses' (No Capital Guarantee), and 'Risk Category' (2 - Moderately Cautious).

At the bottom right of the form are 'Cancel' and 'Save & Update' buttons.