

# Adding/Removing Portfolios from the Central Investment Proposition

Last Modified on 23/02/2024 12:05 pm GMT

Navigate into the Investment Pathways tab.

Click into the CIP you would like to amend:

The screenshot shows the 'Investment Pathways' dashboard. At the top, there is a navigation menu with 'Investment Pathways' selected. Below the menu is a search bar and several utility icons. The main content area is divided into two sections. The first section, titled 'Central Investment Proposition', contains a table with columns: Name, Description, Active, Last Modified, and Owner. The second section, titled 'Discretionary Fund Managers', contains a table with columns: Name, Promoter, Range, Asset Class Type, Risk Rating, Risk Category, and Last Updated Date. A filter dropdown for 'Synaptic Risk Rating' is visible above the table.

Name	Description	Active	Last Modified	Owner
Central Investment Proposition Sep23	Test CIP	No	20/09/2023, 09:46	Amy Paulsen
/a014G00002g1msg1AA		No	06/10/2023, 14:44	
Test CIP	Test CIP Description	No	18/10/2023, 12:51	
Test CIP		No	07/11/2023, 18:19	
Central Investment Proposition	Central Investment Proposition Text	No	08/02/2024, 02:22	
Public Test		No	04/10/2022, 13:53	
Investment		No	17/12/2022, 02:24	
Investment		No	28/11/2023, 02:22	
Test CIP		No	09/11/2023, 02:22	

Name	Promoter	Range	Asset Class Type	Risk Rating	Risk Category	Last Updated Date
7IM Active Adventurous Model Portfolio	Seven Investment Management (Risk)	Active Model Portfolio	Strategic	4.7	Moderately Adventurous	19/02/2024, 14:13
7IM Active Balanced Model Portfolio	Seven Investment Management (Risk)	Active Model Portfolio	Strategic	3.4	Balanced	19/02/2024, 14:13
7IM Active Cautious Model Portfolio	Seven Investment Management (Risk)	Active Model Portfolio	Strategic	2.2	Moderately Cautious	19/02/2024, 14:12
7IM Active Moderately Adventurous M...	Seven Investment Management (Risk)	Active Model Portfolio	Strategic	4.2	Moderately Adventurous	19/02/2024, 14:13
7IM Active Moderately Cautious Model ...	Seven Investment Management (Risk)	Active Model Portfolio	Strategic	2.7	Moderately Cautious	19/02/2024, 14:13

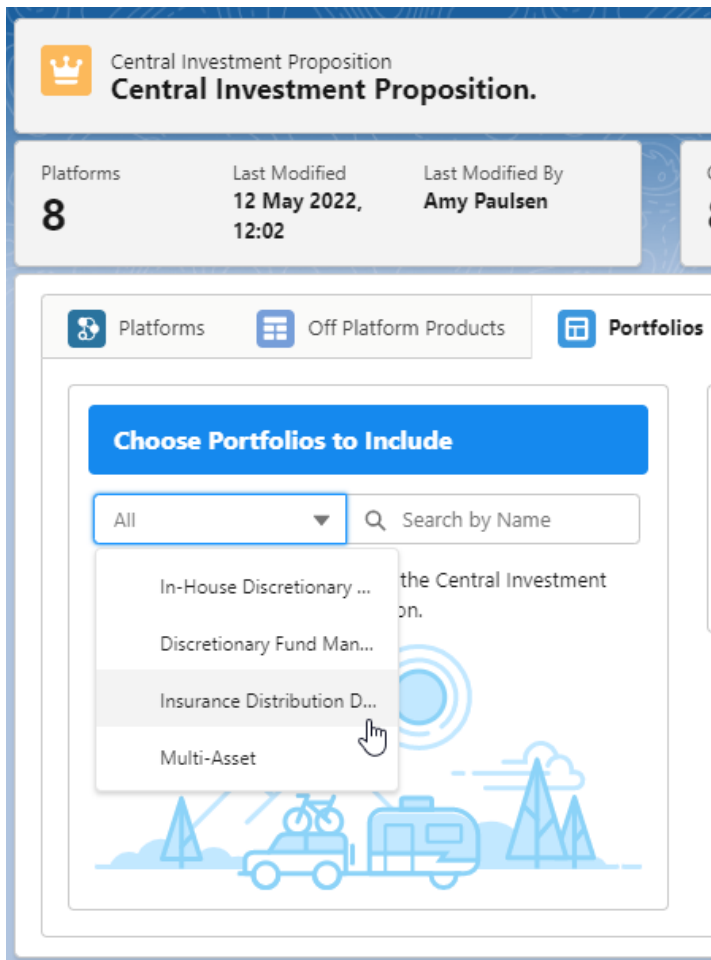
Click into the Portfolio Tab:

The screenshot shows the 'Portfolio' tab selected within the 'Central Investment Proposition Sep23' editor. The top navigation bar shows 'Platforms' (2), 'Off Platform Products' (0), 'Portfolios' (3), 'Fund Lists', and 'Segments' (1). The main content area is split into two panels. The left panel, 'Choose Portfolios to include', has a search box and a dropdown menu set to 'In-House Discretionary'. The right panel, 'Portfolios Selected', shows a table of selected portfolios.

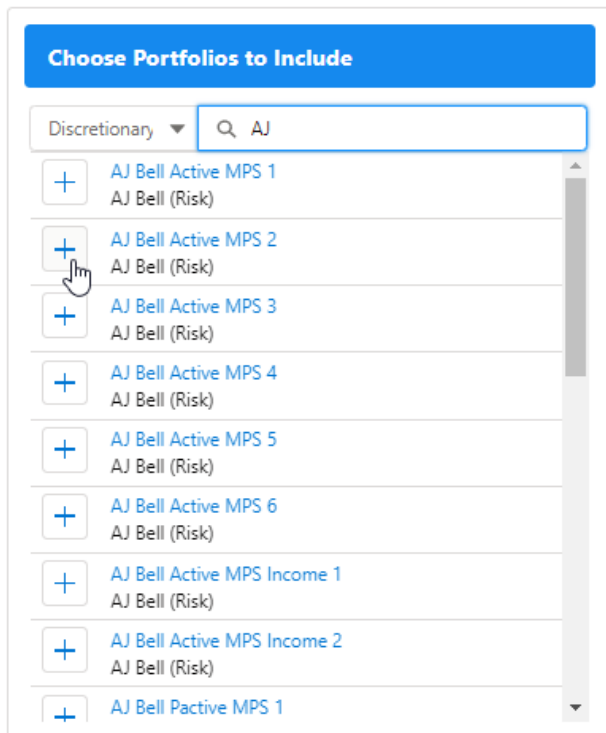
Portfolio Name	Promoter	Portfolio Type	Reason	Remove
1 IHD Portfolio - 1		In_House_Discretionary		
2 IHD Test Portfolio		In_House_Discretionary		
3 IHD Test Portfolio AP		In_House_Discretionary		

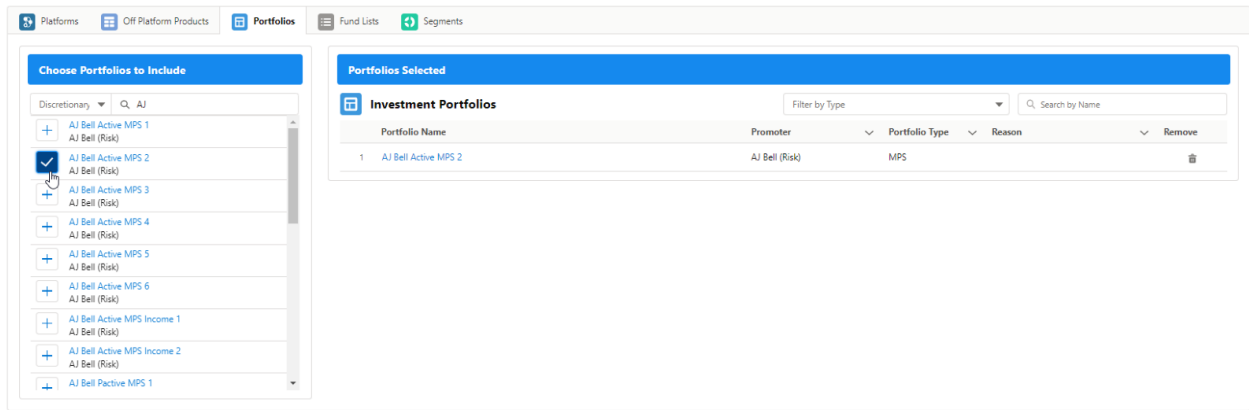
Use the search box on the left of the screen to find Portfolios you would like to add to the CIP.

The all dropdown can be used to set what type of portfolio you would like to search for:

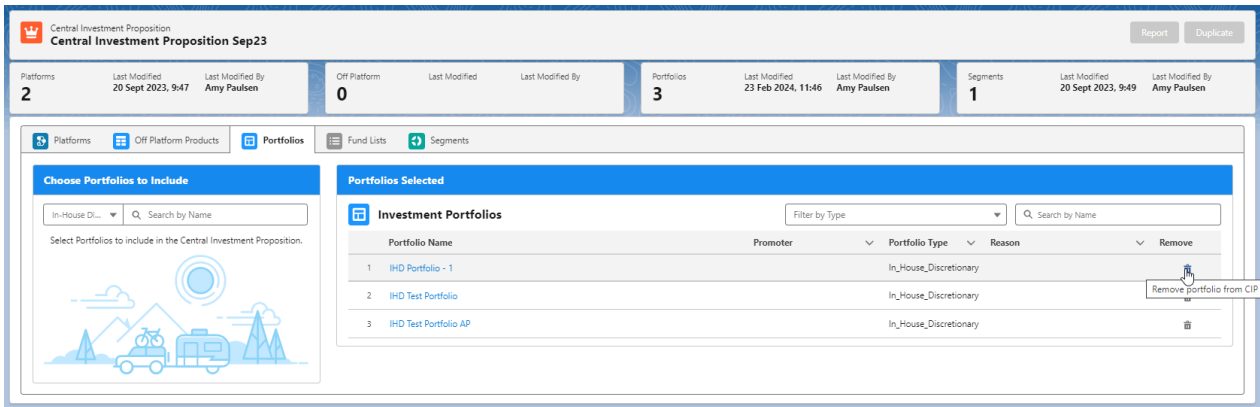


Search and select the + to add to the Portfolios Selected area:





Remove Portfolios through the bin icon:



You will need to add portfolios to any segments you have created. See article [Central Investment Proposition - Adding Portfolios to a Segment](#)