

Amend Portfolio Group

[See previous W5 version guide](#)

PURPOSE

This document shows how to amend and maintain portfolio group.

WHY IS THIS IMPORTANT?

This allows maintaining portfolio group name when changes are required.

PROCEDURE

1. Select Set Up > Risk > Portfolio.

Portfolio

Refresh

Action

Group

Search

Columns

<input type="checkbox"/>	App? ↑↓	Short Name ↑↓	Gross Net ↑↓	Amortisation ↑↓	Entity Default ↑↓	Assigned Acct Cntr ↑↓
<input type="checkbox"/>		DEFAULT	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		STRATEGIC-TFS	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		STRATEGIC-TGL	Net	Constant Yield		TGL-SG
<input type="checkbox"/>		TACTICAL	Net	Constant Yield		TFI-SG
<input type="checkbox"/>		TL-HEDGE	Net	Constant Yield		TFS-SG

1-5 of 5 records

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2. Click Group. The Portfolio Group screen will be displayed.

3. Click the Edit button of the portfolio group to amend. In this example, Strategic Portfolio Group.

Portfolio Group

✕ Cancel ↻ Refresh ▼ Action

Columns

<input type="checkbox"/>		Short Name ↑↓	Description ↑↓
<input type="checkbox"/>		Hedges Port	Hedges Port
<input type="checkbox"/>		Strategic Portfolio Group	Strategic Portfolio Group

1-2 of 2 records << < 1 > >> 50 ▼

4. The Amend Portfolio Group screen will be displayed.

Amend Portfolio Group

✕ Cancel 💾 Save 📄 Duplicate 👤 Assign Member

Short Name*

Strategic Portfolio Group

Long Name

Strategic Portfolio Group

Description

Strategic Portfolio Group

5. In this example, the short name, long name and description will be changed.

Amend Portfolio Group

✕ Cancel

💾 Save

📄 Duplicate

👤 Assign Member

Short Name*

STRATEGIC

Long Name

STRATEGIC

Description

STRATEGIC

6. Click Save. The portfolio group is now amended.

Portfolio Group

✕ Cancel

🔄 Refresh

⌵ Action

🔍 Search

☰ Columns



Short Name ↑↓

Description ↑↓



Hedges Port

Hedges Port



STRATEGIC

STRATEGIC

1-2 of 2 records



1



50



FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[Create Portfolio Group and Assign Members](#)

[Duplicate Portfolio Group](#)

[Delete Portfolio Group](#)

CHANGE HISTORY

Date	By	Changes
21-Jul-2017	Clarissa	Created.
15-Nov-2019	Lyra	Updated screenshots.
13-Mar-2023	TS	Updated to W6 instructions and screenshots.