

Delete Portfolio Group

[See previous W5 version guide](#)

PURPOSE

This document shows how to delete portfolio group.

WHY IS THIS IMPORTANT?

This allows unused portfolio groups to be removed from the system.

PROCEDURE



1. Select Set Up > Risk > Portfolio.

Portfolio

Refresh

Action

Group

Search

Columns

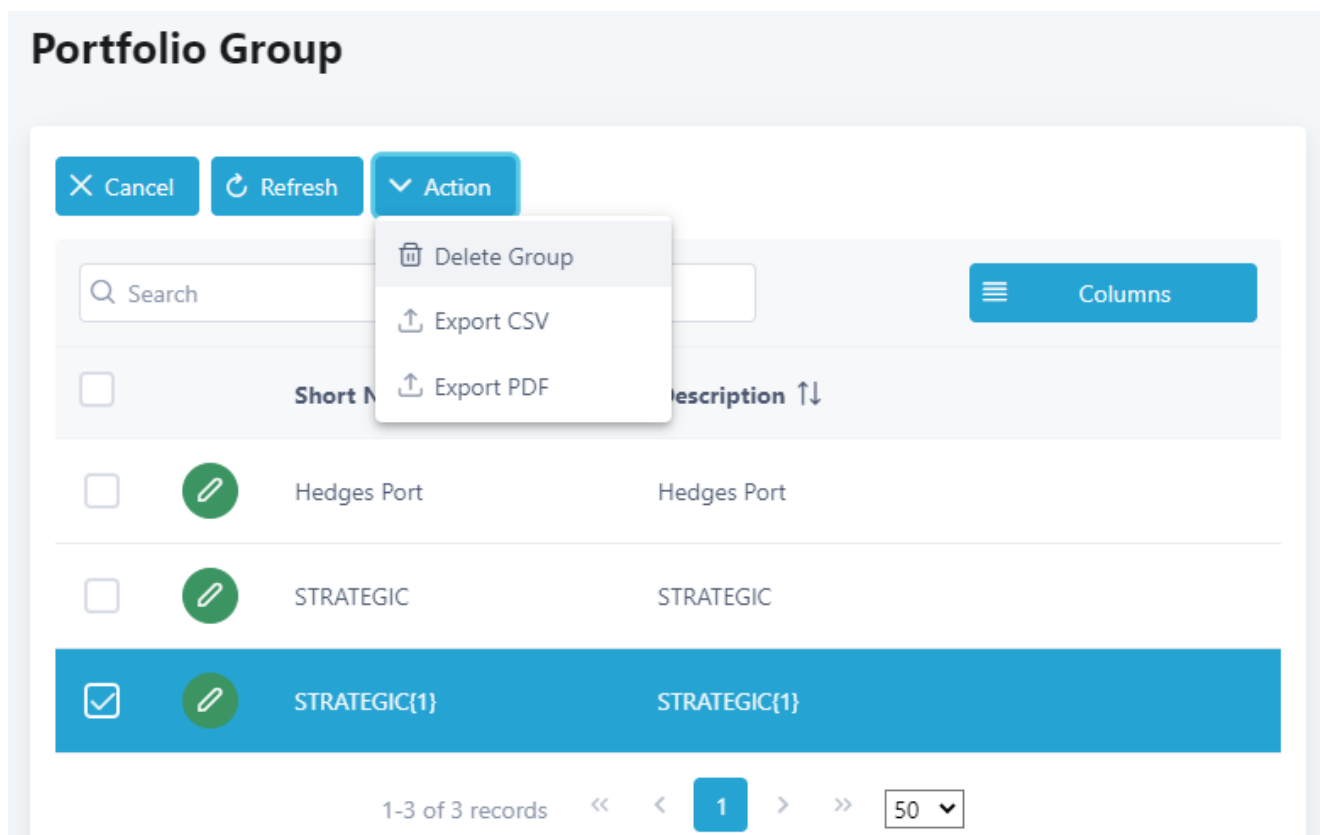
	App? ↑↓	Short Name ↑↓	Gross Net ↑↓	Amortisation ↑↓	Entity Default ↑↓	Assigned Acct Cntr ↑↓
<input type="checkbox"/>		DEFAULT	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		HEDGING	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		STRATEGIC-TFS	Net	Constant Yield		TFS-SG
<input type="checkbox"/>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

1-6 of 6 records

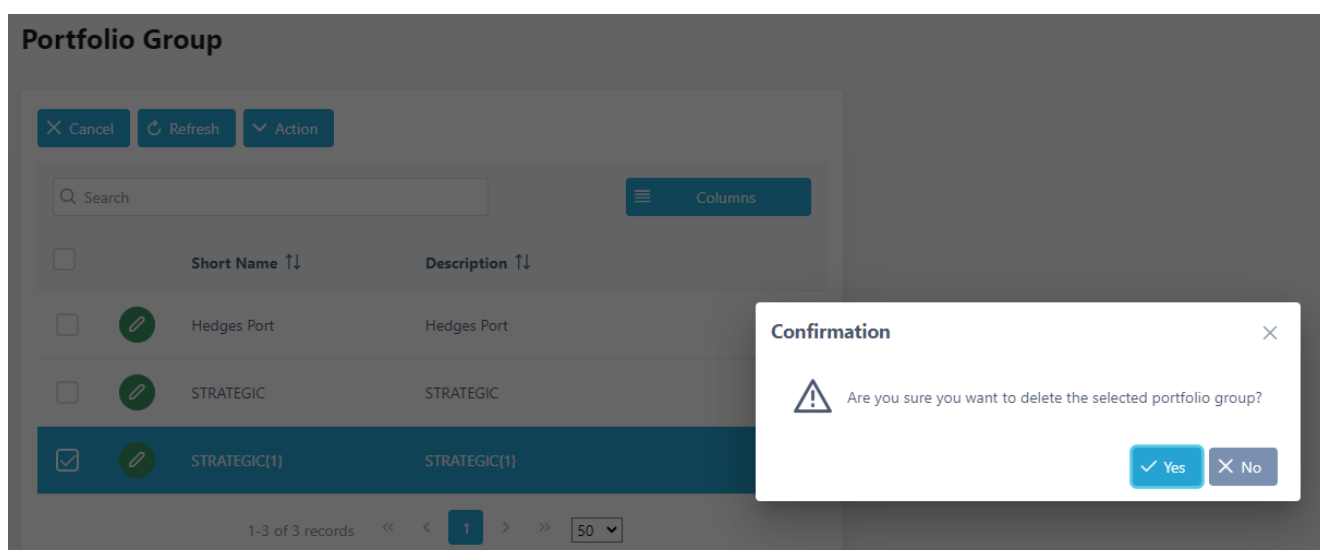
<< < 1 > >>

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2. Click Group. The Portfolio Group screen will be displayed.
3. Tick the checkbox beside the short name of the group to be deleted.



4. Click on Action and select Delete Group. A pop up will appear, click Yes.



FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[Create Portfolio Group and Assign Members](#)

[Amend Portfolio Group](#)

[Duplicate Portfolio Group](#)

CHANGE HISTORY

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