

Duplicate Portfolio Group (W5)

[This version is superseded. Click here to view the latest guide.](#)

PURPOSE








This document shows how to duplicate portfolio group.

WHY IS THIS IMPORTANT?

This allows a quick set up of portfolio group when you need to create a portfolio group that is similar to the existing portfolio groups that you have in the list. By duplicating the portfolio group, the members assigned to the existing portfolio group will also be duplicated.

PROCEDURE

1. Select Set Up > Risk > Portfolio.

Portfolio						
<div>RefreshNewDeleteGroupApprove</div>						
	App? 	Short Name 	Gross Net 	Amortisation 	Entity Default 	Assigned Acct Cntr 
<input type="checkbox"/>		<u>BANK LOAN B</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>BANK LOAN C</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>BOND A</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>DEBT</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>DEFAULT</u>	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		<u>Freight</u>	Net	Constant Yield		FLINVM-SG
<input type="checkbox"/>		<u>HEDGING</u>	Net	Constant Yield		
<input type="checkbox"/>		<u>INVEST</u>	Net	Constant Yield		TFS-SG
<input type="checkbox"/>		<u>Invest</u>	Net	Constant Yield		FLINVM-SG
<input type="checkbox"/>		<u>NEW PORTFOLIO</u>	Net	Constant Yield		TFS-SG

2. Click Group. The Portfolio Group screen will be displayed.
3. Click the Short Name of the Group to duplicate. In this example, TFS Portfolio Group will be duplicated.

Portfolio Group

	Short Name ↕	Description ↕
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<u>Hedges Port</u>	Hedges Port
<input type="checkbox"/>	<u>TFS Portfolio Grp</u>	TFS Portfolio Grp

4. The Amend Portfolio Group screen will be displayed.

Amend Portfolio Group

Short Name*

Long Name

Description

5. Click Duplicate. There will be another portfolio group with the same name but with {1} after. You may change the Short Name by clicking the Short Name and edit in the Amend Portfolio Group screen.

Portfolio Group

	Short Name ↕	Description ↕
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<u>Hedges Port</u>	Hedges Port
<input type="checkbox"/>	<u>TFS Portfolio Grp</u>	TFS Portfolio Grp
<input type="checkbox"/>	<u>TFS Portfolio Grp{1}</u>	TFS Portfolio Grp{1}

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[Create Portfolio Group and Assign Members](#)

[Amend Portfolio Group](#)

[Delete Portfolio Group](#)

CHANGE HISTORY

Date	By	Changes
25-Jul-2017	Clarissa	Created.
28-Nov-2019	Lyra	Updated Screenshots.