

Duplicate Portfolio Group

[See previous W5 version 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

☐	App? ↑↓	Short Name ↑↓	Gross Net ↑↓	Amortisation ↑↓	Entity Default ↑↓	Assigned Acct Cntr ↑↓
☐		DEFAULT	Net	Constant Yield		TFS-SG
☐		HEDGING	Net	Constant Yield		TFS-SG
☐		STRATEGIC-TFS	Net	Constant Yield		TFS-SG
☐		STRATEGIC-TGL	Net	Constant Yield		TGL-SG
☐		TACTICAL	Net	Constant Yield		TFI-SG
☐		TL-HEDGE	Net	Constant Yield		TFS-SG

1-6 of 6 records << < 1 > >> 50 ▾

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

3. Click the Edit button of the group to duplicate. In this example, STRATEGIC portfolio group will be duplicated.

Portfolio Group

☐		Short Name ↑↓	Description ↑↓
☐		Hedges Port	Hedges Port
☐		STRATEGIC	STRATEGIC

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

Long Name

STRATEGIC

Description

STRATEGIC

5. Click Duplicate. The portfolio group is now duplicated and the short name of the duplicated group is appended with {1}. You may change the Short Name by clicking the Edit button and amend the short name in the Amend Portfolio Group screen.

Portfolio Group

✕ Cancel

🔄 Refresh

⌵ Action

🔍 Search

☰ Columns



Short Name ↑↓

Description ↑↓



Hedges Port

Hedges Port



STRATEGIC

STRATEGIC



STRATEGIC{1}

STRATEGIC{1}

1-3 of 3 records



1



50 ▼

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.
21-Mar-2023	TS	Updated to W6 instructions and screenshots.