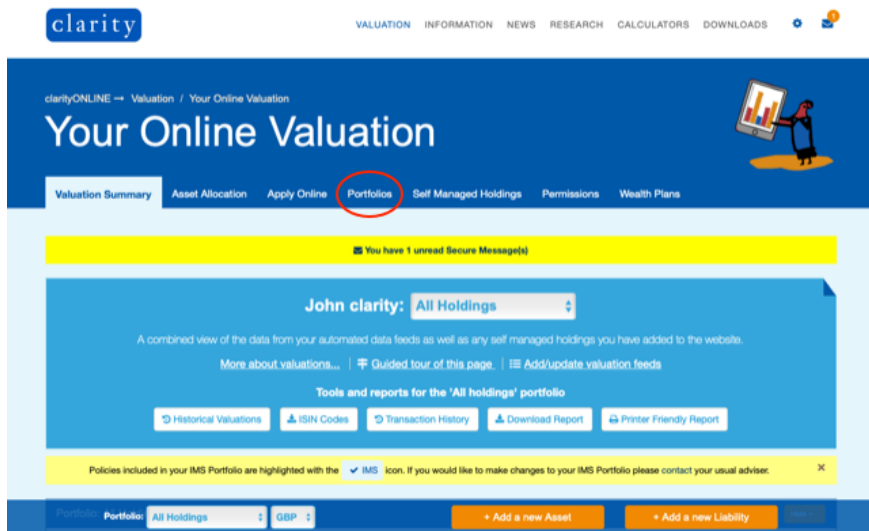


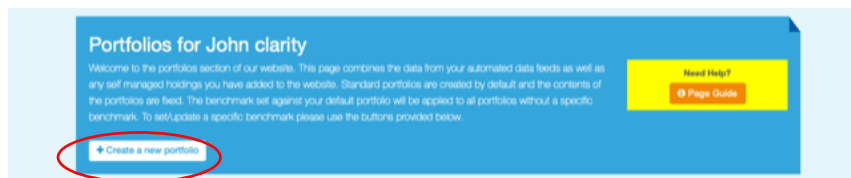
How to split your investments into multiple portfolios

When viewing the valuation reports on clarityONLINE you may want split on your investments into multiple portfolios. By default Pension, Non Pension portfolios and All Holdings portfolios are created automatically for you. This help guide shows you how to create your own custom portfolios and set the default reporting portfolio across clarityONLINE.

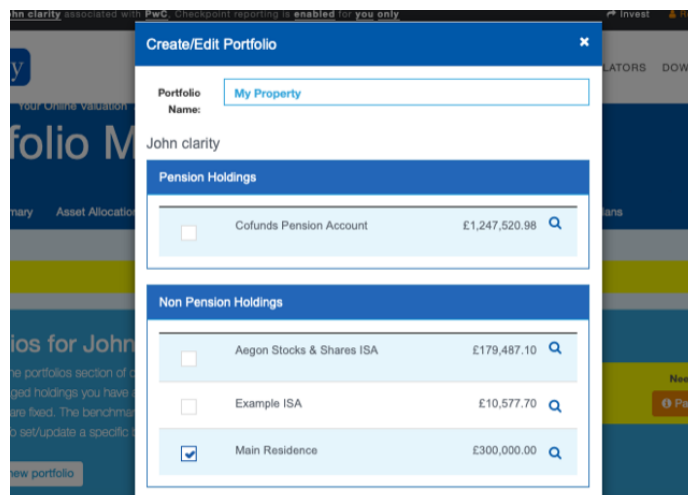
1. Go to the *Portfolios* tab to create your custom portfolio



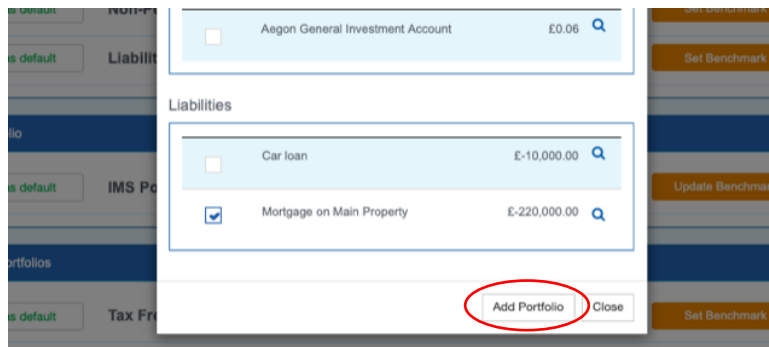
2. The click on the *Create a new portfolio* button



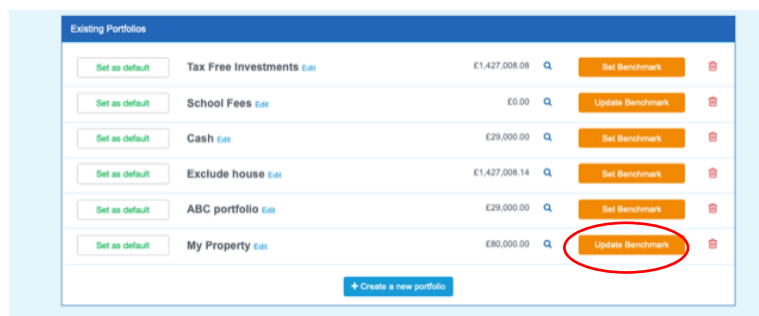
3. Add a Portfolio Name and select the holdings



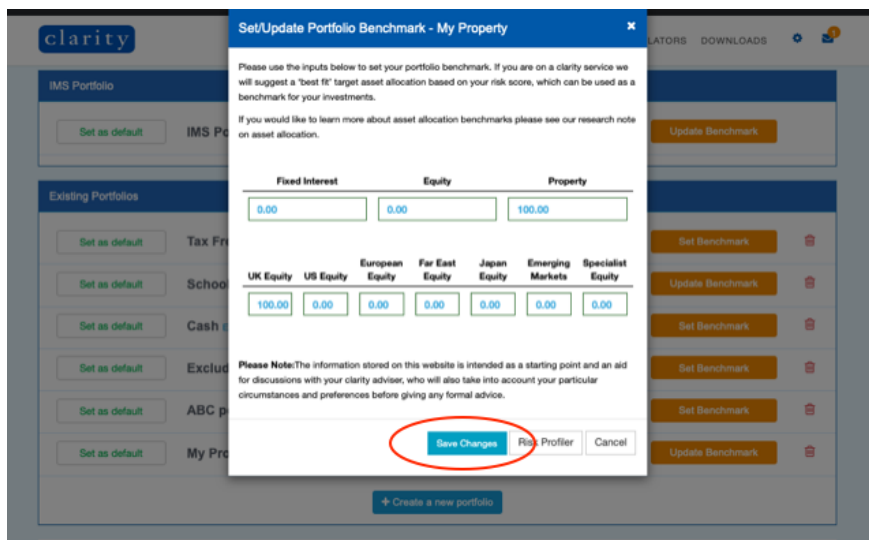
4. Select *Add Portfolio* to save



5. Set or update a benchmark



6. Enter the details and *Save Changes*



7. Return to your *Valuation Summary*

clarityONLINE → Valuation / Your Online Valuation

Your Online Valuation

Valuation Summary Asset Allocation Apply Online Portfolios Self Managed Holdings Permissions Wealth Plans

You have 1 unread Secure Message(s)

John clarity My Property

A combined view of the data from your automated data feeds as well as any self managed holdings you have added to the website.

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Tools and reports for the 'All holdings' portfolio

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8. Select the new portfolio from the drop down pictured above to view the new portfolio

