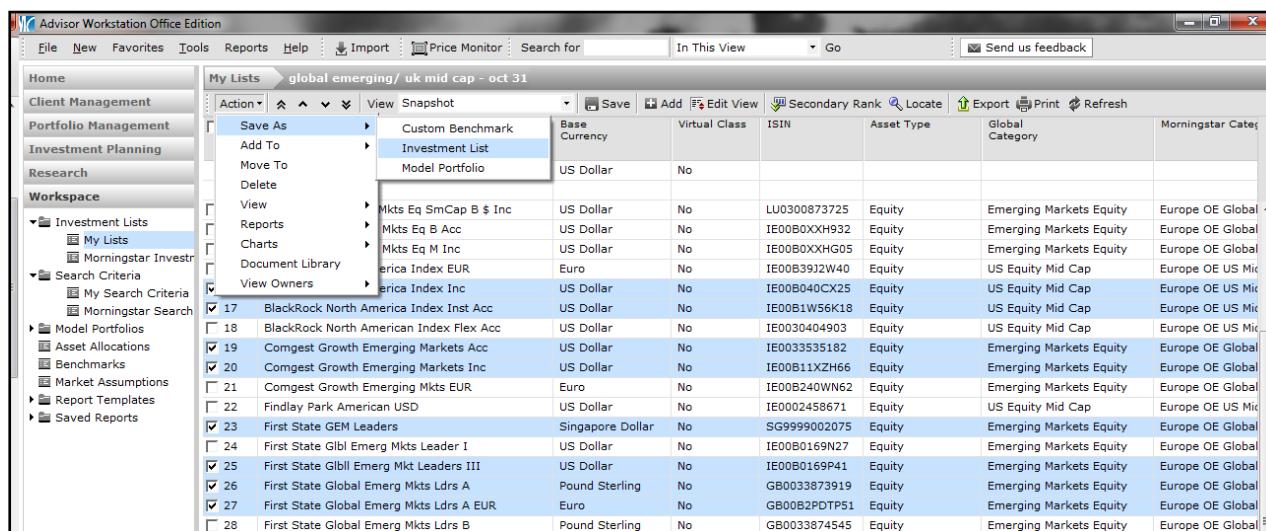


Save a list of funds

You can save a list of funds in Adviser Workstation as an Investment List, allowing you to add funds to models and portfolios quickly.

Tick the funds you'd like to add to the investment list, then go to Action>Save As> Investment List:



Give the list a name and click Save.

Quick tip – tick the box in the first column to tick all the funds in the list at once:

