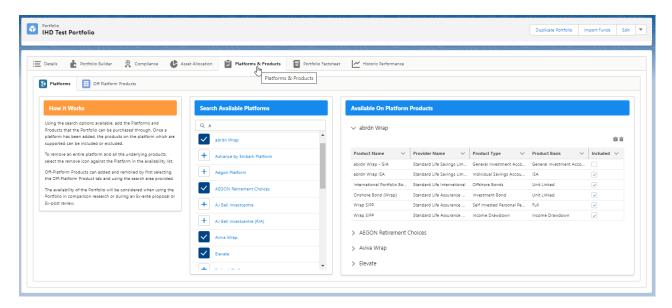
In-House Discretionary - Special Deals

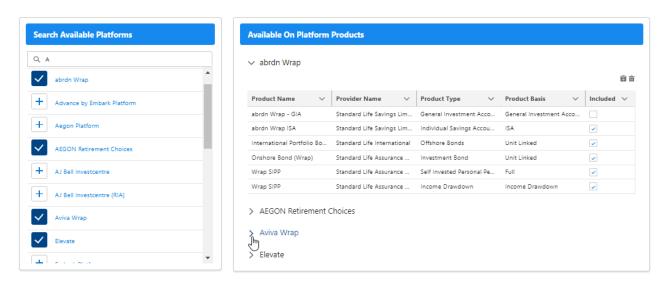
Last Modified on 23/04/2024 11:44 am BST

A Special Deal can be created under a Platform/Off-Platform product assigned to an In-House Discretionary Portfolio.

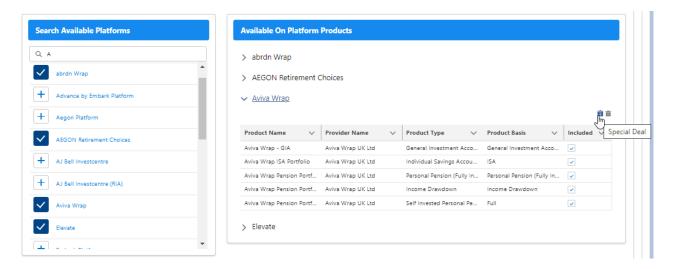
Navigate to the Platforms & Products tab in the In-House Discretionary Portfolio:



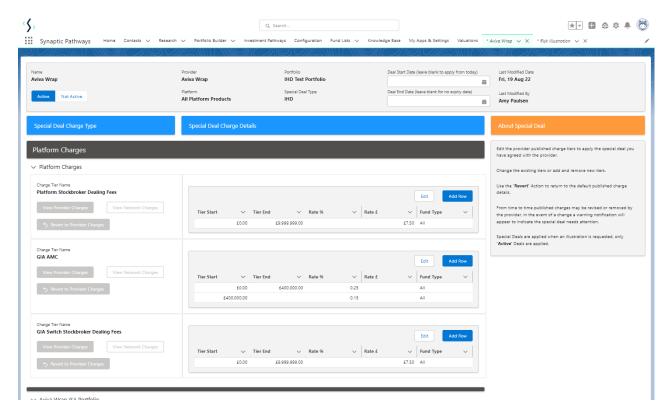
Click/maximise the product you would like to create the Special Deal against:



Click on the folder button at the top right of the product:



This will take you to the Special Deal:



The Portfolio name can be found within the summary box at the top of the screen:



Complete the details of the Special Deal. For more information on how to complete the special deals area, see article Creating Special Deals