Can I apply a special deal to MPS portfolios?

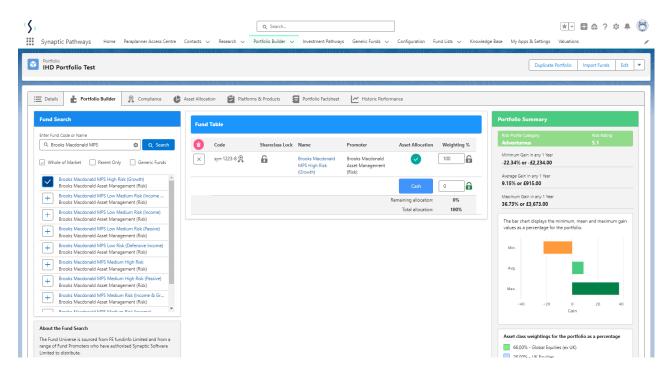
Last Modified on 23/02/2024 12:15 pm GMT

You can apply a deal by creating an In-House Discretionary portfolio.

1. In-House Discretionary portfolio

Build the IHD portfolio in the normal way through Portfolio Builder. You can use one portfolio, or more as required.

See article In-House Discretionary - Create a Portfolio

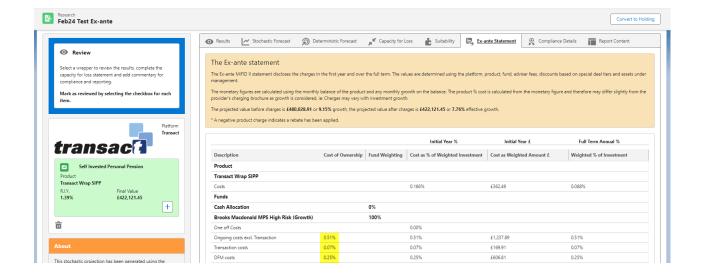


2. Check the standard costs in the system by doing a piece of nominal research.

See articles on our Knowledge base on how to create Ex-ante research here.

Navigate to Research> New> Ex-Ante. Add Investment> Enter an investment amount> Select portfolio> Tick a platform in the Results screen and continue to Ex-Ante Illustration.

View the Ex-Ante Statement to view portfolio costs.

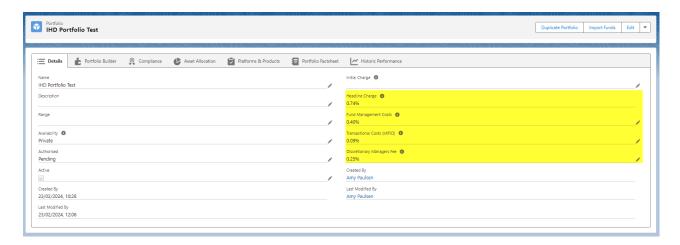


3. Pricing of the In-House Discretionary portfolio

Ensure that the adjusted pricing is correct in the Details tab for IHD portfolio.

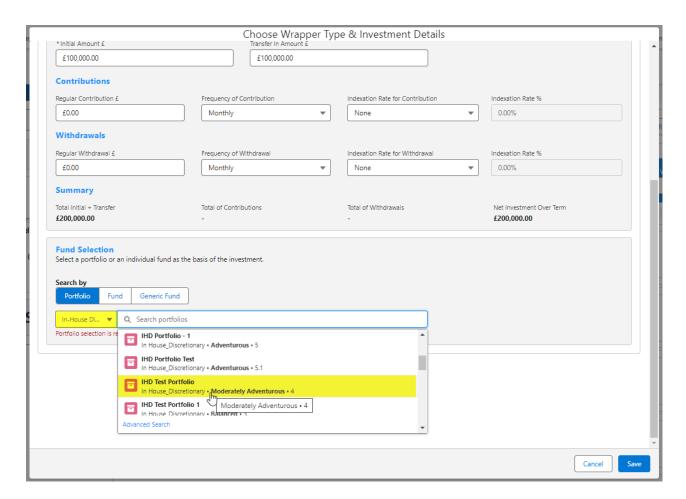
You can find this in Portfolio Builder> Select Portfolio> Details.

- 1. In this example, we've reduced the fund management cost to reflect the discount;
- 2. Remember also to define the platform availability in the Platform and Products tab:

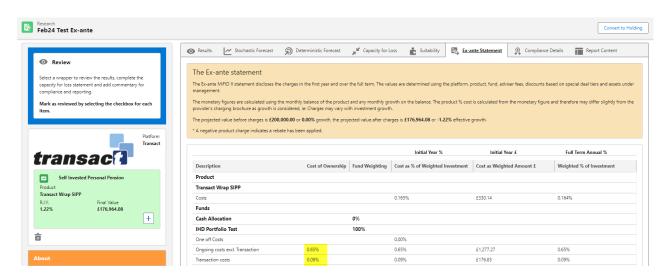


4. Conduct Research

Select the new portfolio in the research. Select In-House Discretionary in the drop down to narrow the search:



5. Research will include the correct fund costs



If you have a Central Investment Proposition, you can add the portfolio to the CIP. See article Adding/Removing Portfolios from the Central Investment Proposition