What's New in

Wealth Suite

February 2022

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Release Highlights

Wealth Suite

Channels and Channels Packaging » Introducing Tactical Model Allocation in Strategy

The Strategy feature is now enhanced with the Tactical Model Allocation (TMA) functionality in model portfolios, which allows the user to:

- Manage a non-overlay portfolio when the TMA model is linked.
- Exclude a specific market segment when the market structure is selected as part of the model portfolio.
- Realign the portfolio based on a specific model portfolio.
- Restrict to link a model portfolio that has the same market structure as investment profile.

The topics related to this feature are given below:

TMA in Channels

Realign of Portfolios

TMA in Channels Packaging

Channels and Channels Packaging » Searching and Realigning Model Portfolios in Strategy

The Strategy feature is enhanced to allow the users to search and realign portfolios that are directly linked with Model Portfolios or linked through an Investment Profile strategy.

The topics related to this feature are given below:

Realigning Portfolios Linked Directly or Indirectly with Model Portfolio

Model Portfolio

CONTAINS_SUB_MODEL Function