PORTFOLIO TOOLS / CLIENT GUIDE 07

Removing a holding from a watchlist

How to delete a stock line from a watchlist you have created in Client Portal.

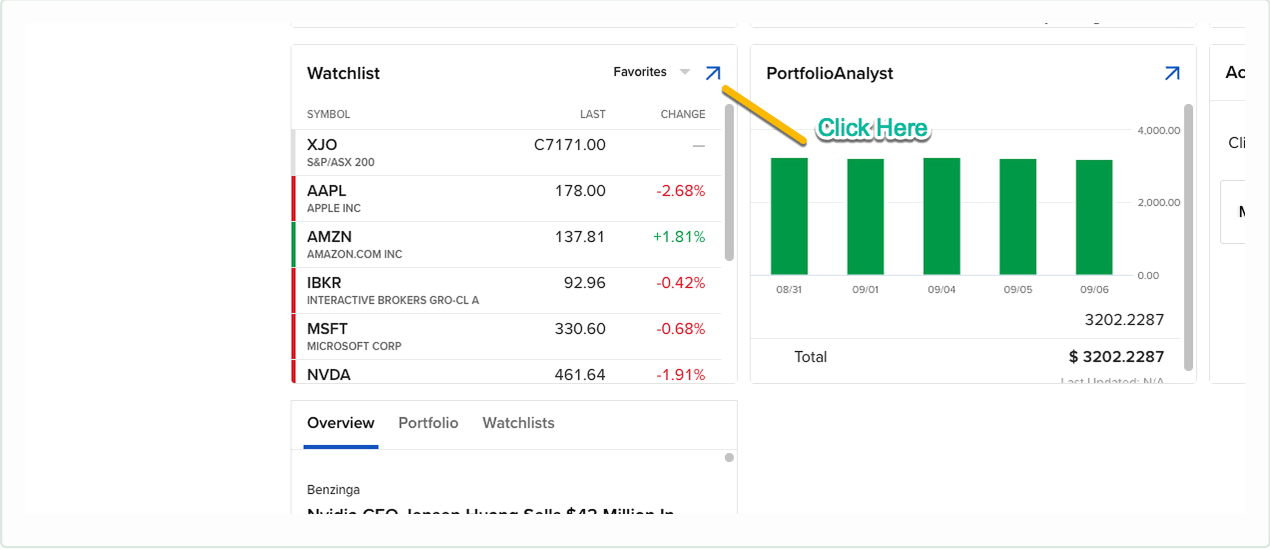
WHERE
Client Portal

TAKES EFFECT
Immediately

STEP BY STEP

1 Open your watchlist

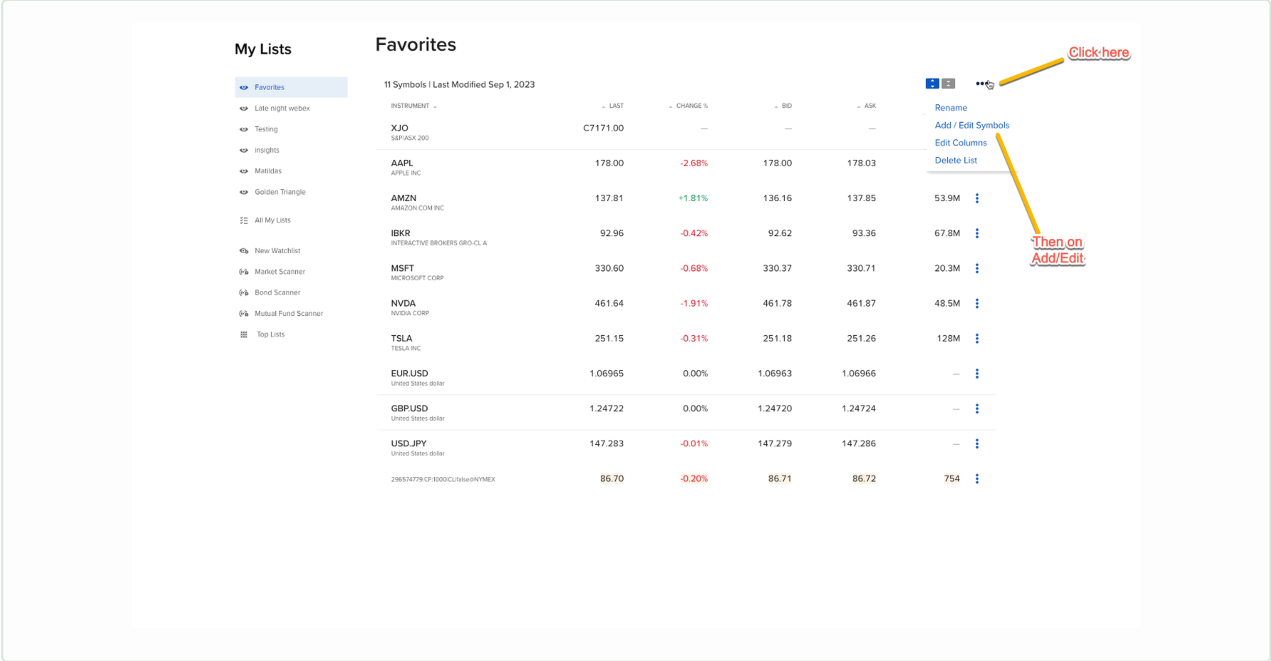
Log in to your portal. On the watchlist tile you have created, click the blue side arrow at the top right of the tile.



The blue side arrow on the watchlist tile

2 Open Add/Edit Symbols

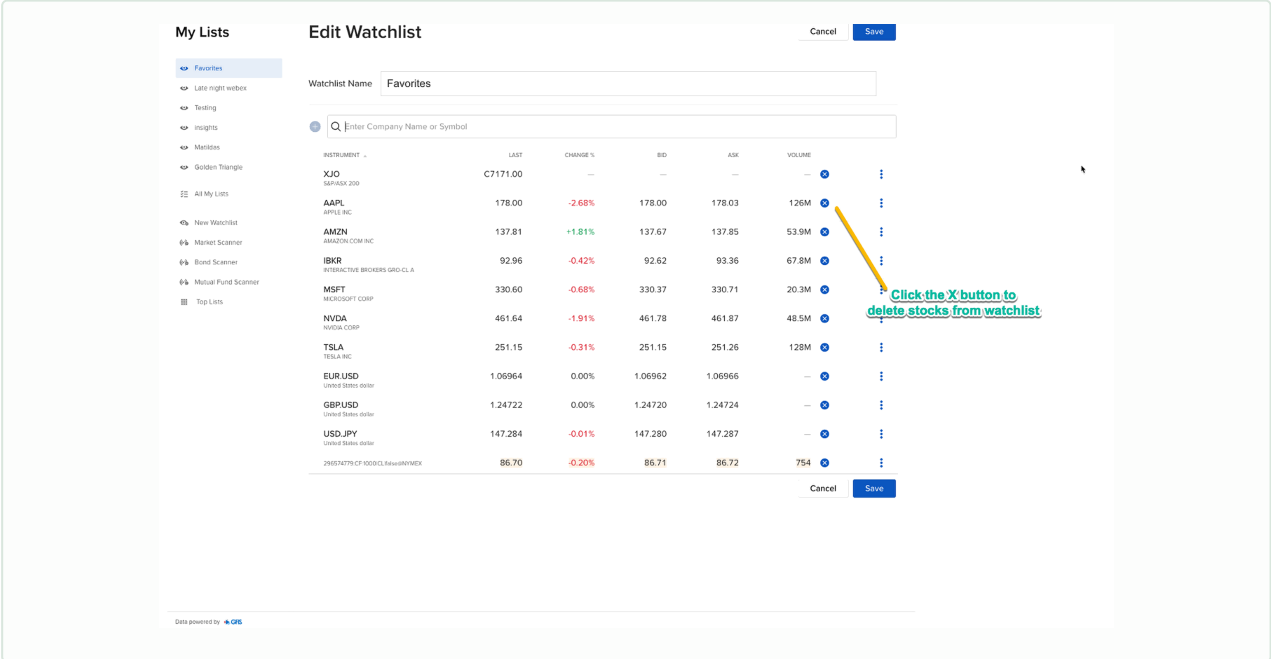
In the top right corner, click the three dots and choose **Add/Edit Symbols**.



Add/Edit Symbols in the watchlist menu

3 Remove the stock lines

Click the blue **X** beside any stock line you want to remove.



Click the blue X to remove a line

4 Save your changes

Click **Save** at the bottom once you have removed the lines.

NEED A HAND?

If anything on this page looks different to your screen, or a step does not complete, contact our customer service desk before trying again.

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Screens, menu names and button positions shown in this guide may differ slightly from what you see, as the platform is updated from time to time. Screenshots are for illustration only.

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