Nordea
MARKETS

Getting started

Importing portfolios from excel setup

Nordea Analytics

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Portfolio export

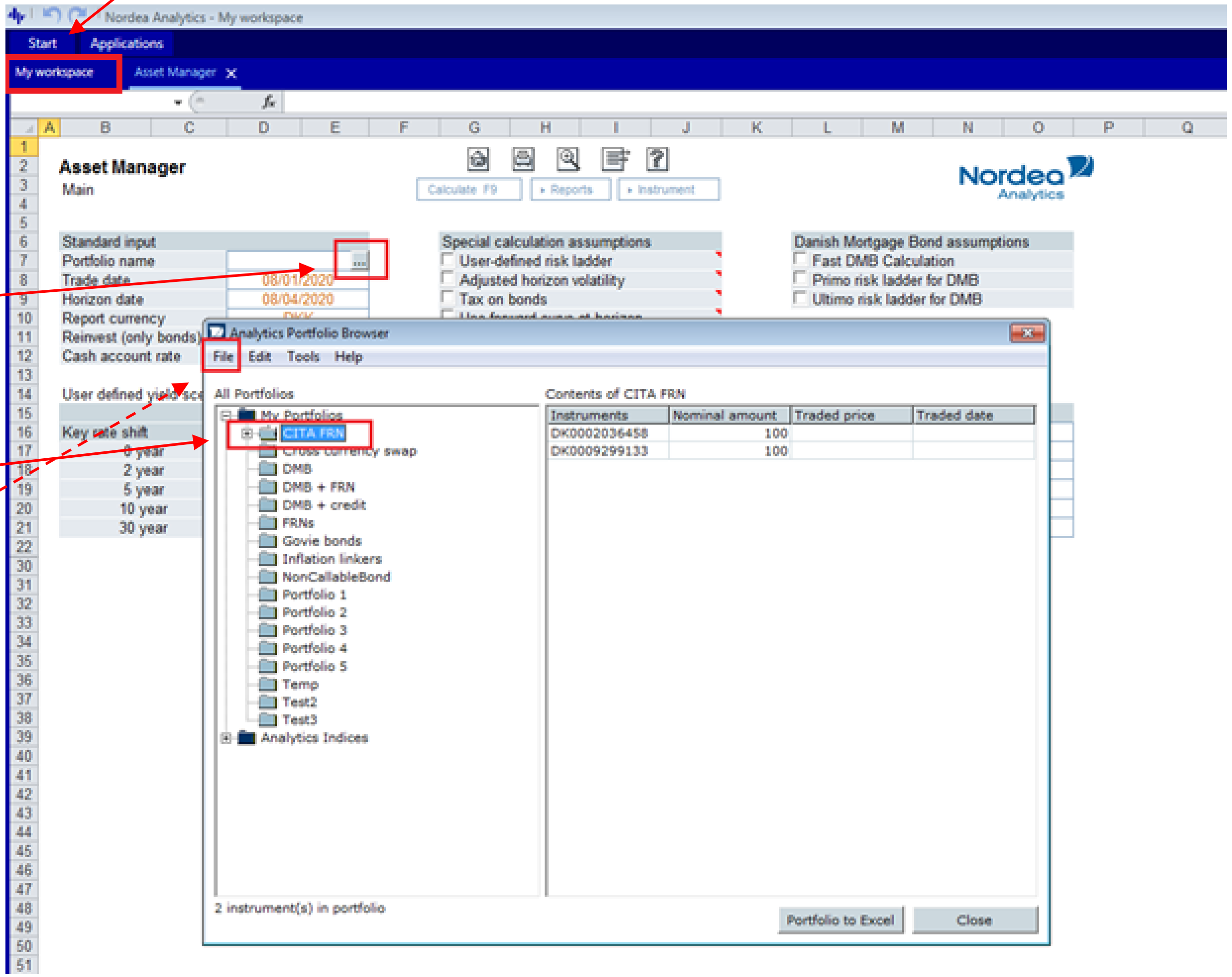
To import a portfolio into the new setup, start by exporting it from the Asset Manager.

4. Go back to the front page by selecting My workspace

1. Select the "…" icon to open the Analytics Portfolio Browser

2. Select the portfolio you want to export, in this case CITA FRN

3. Select File and Export to File. This opens a new windows, choose where to save the exported portfolio. The file can be deleted when it has been imported and saved, see next slide.



Portfolio import

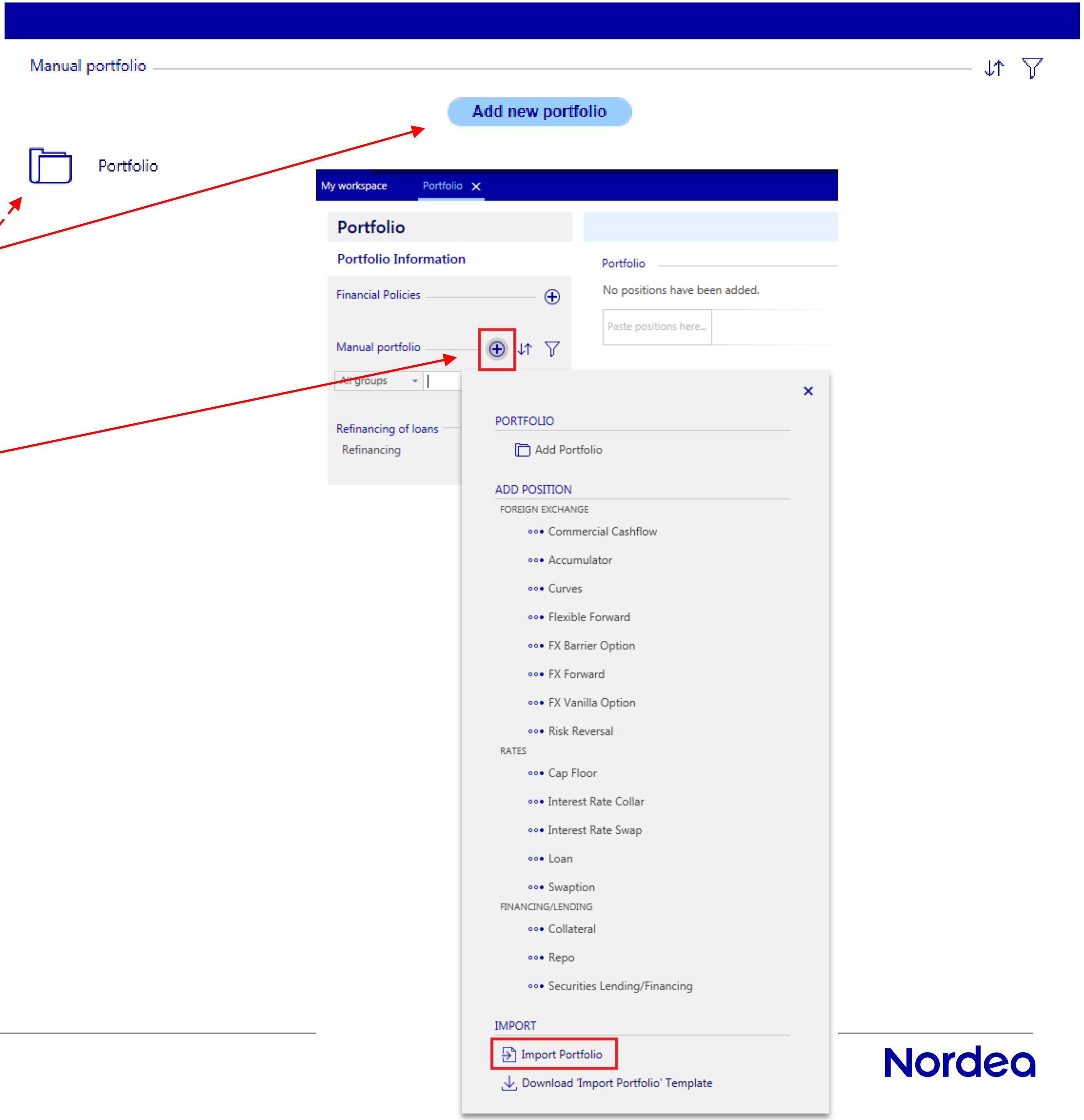
Having exported the portfolio, it can now be imported into the new setup.

1. Create an empty Portfolio

2. Double-click the portfolio to open

3. Select the plus sign (+) to open the portfolio options menu

4. Select Import Portfolio



Portfolio import cont.

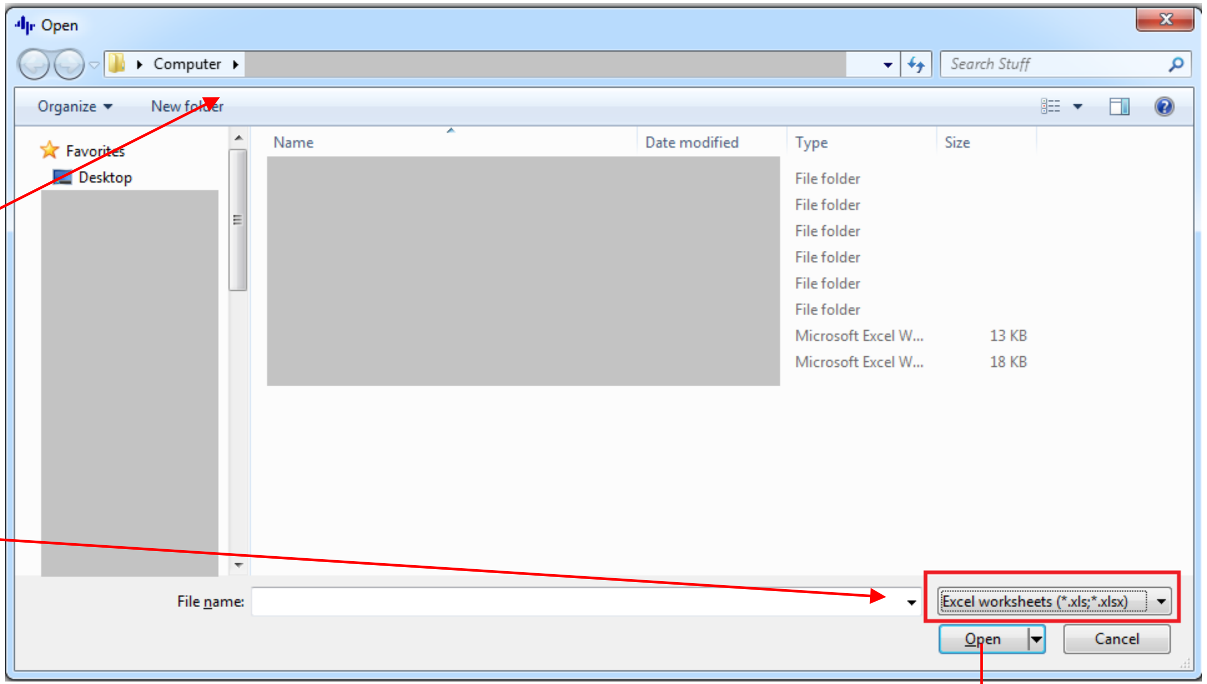
Selecting Import Portfolio opens a new window.

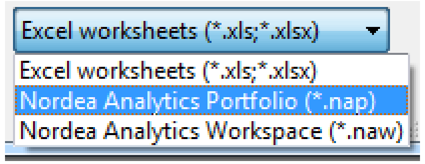
1. Find the location where the exported file was saved to earlier

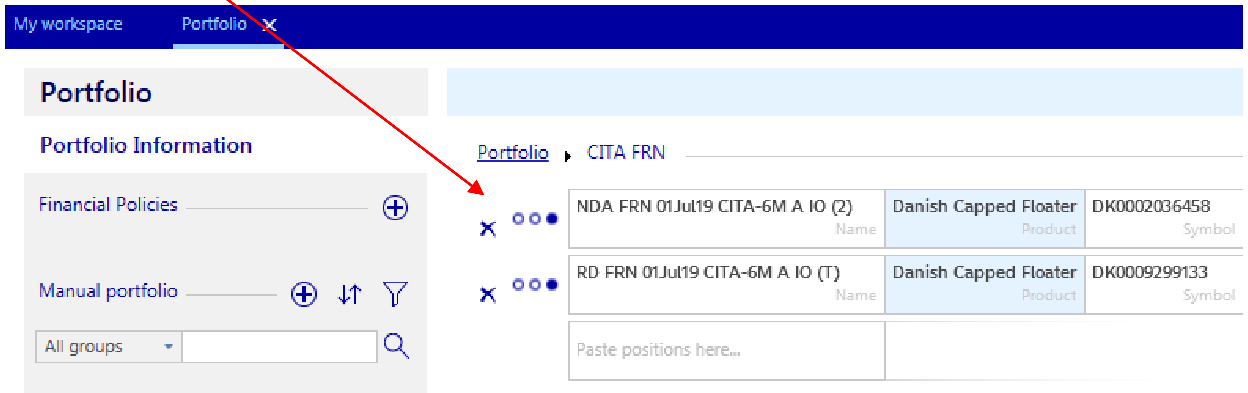
2. Change the file extension from Excel worksheets to Nordea Analytics Portfolio

3. Select the file and press Open

4. The instruments will now be in the new portfolio







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Save portfolios

After importing the portfolio, remember to save it.
Portfolios are saved as a workspace, which is a file that is saved to your computer.
This means it is easy to share portfolios with colleagues.
A workspace can contain multiple portfolios.

1. In the top-left corner, select Start and Save As.

2. Save the workspace somewhere easy to find.

3. Recently used workspaces can quickly be opened again from the front page.