

Syfe

How to transfer funds from one portfolio to another

Step 1: Login to your account



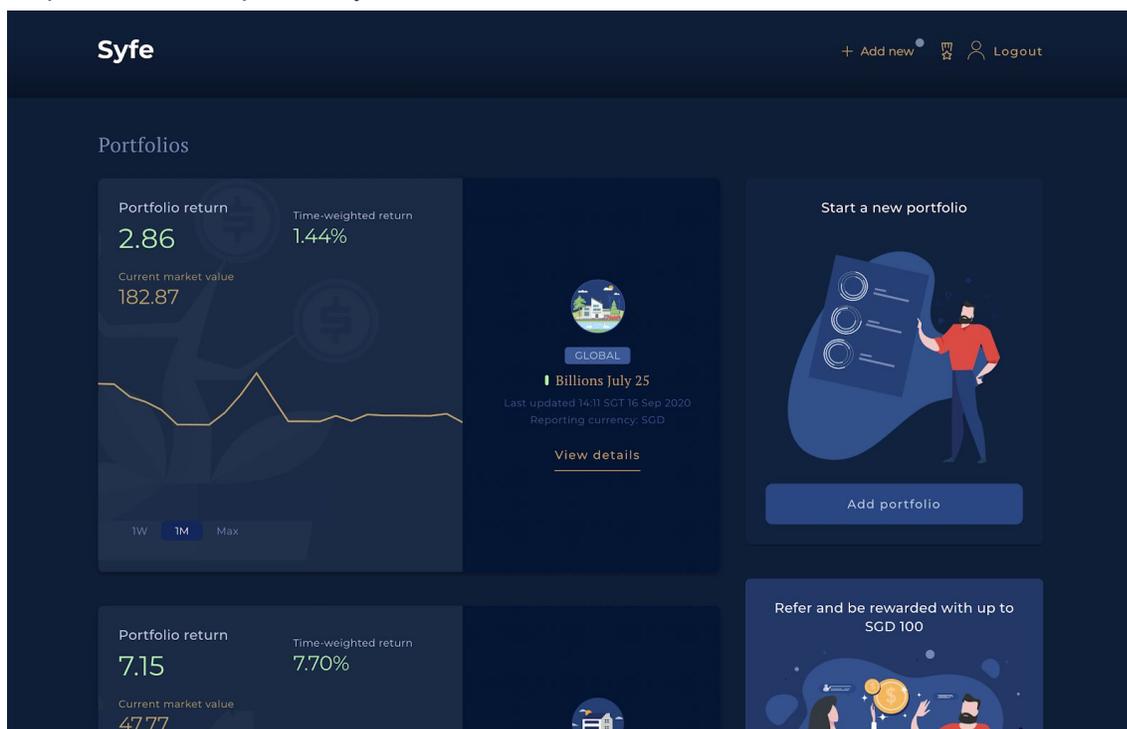
Login to your account

Email

Password 

[Forgot password?](#) [Need help?](#)

Step 2: Select the portfolio you want to transfer from



Step 3: Select manage funds

Syfe + Add new Logout

< Dashboard | Billions July 25

Billions July 25 GLOBAL

ID: 106 Created on: 10 Jul 2019

Currency: SGD 1 USD = 1.3611 SGD

Last update - 16 Sep 2020 14:11 SGT

[Manage funds](#)

Performance

Current market value **182.87**

Projected value **35.5k*** (15 years)
[Know more](#)

Return

Invested amount **180.01**

Time-weighted return **1.44%**

Portfolio return (Cumulative return) **2.86** (1.59%)

Asset Impact **2.17**

Currency Impact **0.69**

Jul 2019 Feb 2020 Sep 2020

1W 1M 3M 6M 1Y **Max** Future

Can you improve your investment choices?

Transactions

Step 4: Select "Transfer between Syfe portfolios"

Syfe + Add new Logout

< Dashboard | Billions July 25 | Manage funds

Billions July 25 GLOBAL

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Last update - 16 Sep 2020 14:11 SGT

[Manage funds](#)

Manage funds

- Add funds
Add funds to your portfolio
- Transfer between Syfe portfolios**
Send funds from this portfolio to another portfolio in your account
- Withdraw funds
Withdraw funds from this portfolio to your bank account

[Proceed](#)

Step 5: Choose which portfolio you want to transfer to

Syfe + Add new Logout

< Dashboard | Billions July 25 | Transfer funds

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Last update - 16 Sep 2020 14:11 SGT

Manage funds

Transfer funds

Transfer funds to another portfolio in my account

Send funds from
Billions July 25 (GLOBAL)

Send funds to

Submit

Step 6a: If you choose partial transfer, enter the amount.

< Dashboard | Billions July 25 | Transfer funds

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Manage funds

Transfer funds

Transfer funds to another portfolio in my account

Send funds from
Billions July 25 (GLOBAL)

Send funds to
Property Purse (REIT+)

Full transfer Partial transfer

Amount - SGD
100

You can partially transfer up to SGD 164 (90% of the current portfolio value)

Submit

For partial transfers, you can only transfer up to 90% of total portfolio value

Step 6b: Otherwise you can choose full transfer

Dashboard | Billions July 25 | Transfer funds

Billions July 25 GLOBAL

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Transfer funds

Transfer funds to another portfolio in my account

Send funds from
Billions July 25 (GLOBAL)

Send funds to
Property Purse (REIT+) ▼

Full transfer Partial transfer

Submit

[^ Disclaimer *](#)

Valuation is based on market closing prices of 15 Sep 2020 obtained from our broker or other independent sources. Exchange rate used is 1 USD = 1.3611 SGD. All amounts are rounded up to 2 digits and those less than 0.01 are shown as .00.

Step 7: Once you hit submit, a confirmation message will appear

Billions July 25 GLOBAL

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Transfer funds

Transfer funds to another portfolio in my account

Send funds from
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Send funds to
Property Purse (REIT+) ▼

Full transfer Partial transfer

Submit

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If you disagree with any transactions, or if there are any errors or omissions, please notify our Customer Support staff at support@syfe.com as soon as possible. Otherwise, these will be conclusively deemed accurate.

Your transfer request has been received.
Please check your email for the confirmation details

Okay

You will receive an email confirmation as well