

Portfolio Bundle

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Description

Financial meaning

A **portfolio bundle** is a logical grouping of multiple portfolios that are managed, monitored, or processed together. It allows combining different portfolios under a single structure for operational efficiency, consolidated reporting, or grouped reconciliation.

Platform abstraction

In the Finmars platform, a **Portfolio Bundle** serves as an entity that links several [portfolios](#) into a single operational unit.

Portfolio Bundles are used in:

- Grouping multiple [portfolios](#) together to allow consolidated views for valuation, [reporting](#), and performance analysis.
- Enabling aggregated [reconciliation](#) workflows by combining cash and position data across bundled portfolios.
- Allowing batch operations and monitoring across multiple [portfolios](#) in operational workflows.

Examples

Name	Unique Code	Notes
CH-BND-20394857	CH-BND-20394857	

- **Name**: Display name of the portfolio or bundle, used for identification in the interface.
- **Unique Code**: System-generated unique identifier for the portfolio or bundle, used for internal references and linking.

- **Notes:** Additional comments or descriptions to provide operational or contextual information.

Cookbook

CRUD

Operations within platform.

Use Cases

What for it's used.

F.A.Q.

Frequently asked questions.

API documentation

Link to API documentation.

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