

# Comparison & Ex-Ante - Research Filtering

Last Modified on 05/08/2024 2:58 pm BST

The screenshot shows the Synaptic Pathways research filtering interface. Callouts provide the following information:

- Term Update Results** button will refresh the results
- This button will be greyed out on the Whole of Market Research
- Change Segment** will only be available when using a CIP
- Stakeholder Pension** when selected, will appear at the top of the results
- Exclude Fees** in the results
- Report**
- 3 Significant Figures**
- Filter Results by Provider**
- Filter Results by Product**
- Sort Results by Value**
- Unselect/Select Investments** to include in the results

Platform	Investment Management	Growth	Final Value	Total Fees	RfY
7IM	Sevens Investment Management (Shares) • 7IM SIPP	4.84%	£421,714.00		
7IM	Sevens Investment Management ISA (Stocks and Shares) • Modular iSPP	4.80%	£419,422.76	£5,957.08	0.16%
7IM	Sevens Investment Management ISA (Stocks and Shares) • AI Bell Investcentre SIPP	4.80%	£418,181.31	£7,198.53	0.20%
P   PLATFORM	P1 Investment Management P1 ISA • The P1 SIPP	4.76%	£416,601.28	£8,778.56	0.24%

## Term

Term: 10 [Update Results]

When updating the term, click **Update Results**

Term: 15 Update Results Change Segment Stakeholder Pension Exclude Adviser Fees 3 Significant Figures Report

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % | Final Value £ | Charges £ | RLY %

Platforms 27 of 27 Results

	<b>Seven Investment Management</b> ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	RLY 0.10%	<span>+</span>
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • Modular iSIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	RLY 0.16%	<span>+</span>
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	Growth 4.80%	Final Value £418,181.31	Total Fees £7,198.53	RLY 0.20%	<span>+</span>
	<b>P1 Investment Management</b> P1 ISA • The P1 SIPP	Growth 4.76%	Final Value £416,601.28	Total Fees £8,778.56	RLY 0.24%	<span>+</span>
	<b>AJ Bell (Investcentre)</b> AJ Bell Investcentre Investment ISA • AJ Bell Investcentre SIPP	Growth 4.72%	Final Value £415,275.55	Total Fees £10,104.29	RLY 0.28%	<span>+</span>

## Filter Results by Provider

Filter the results by selecting one or more providers in the drop down:

Term: 10 Update Results

Filter Results by Provider: Filter one or more providers

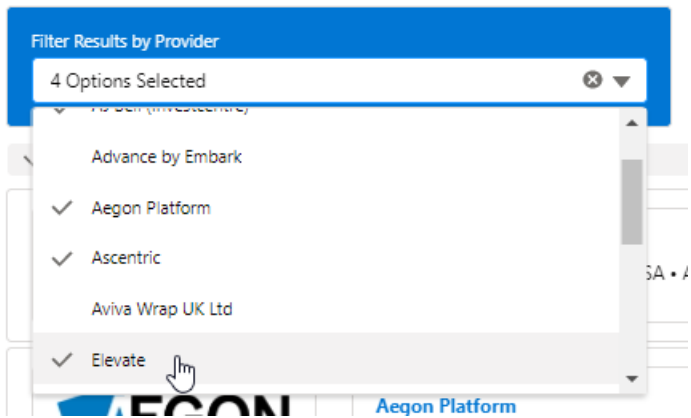
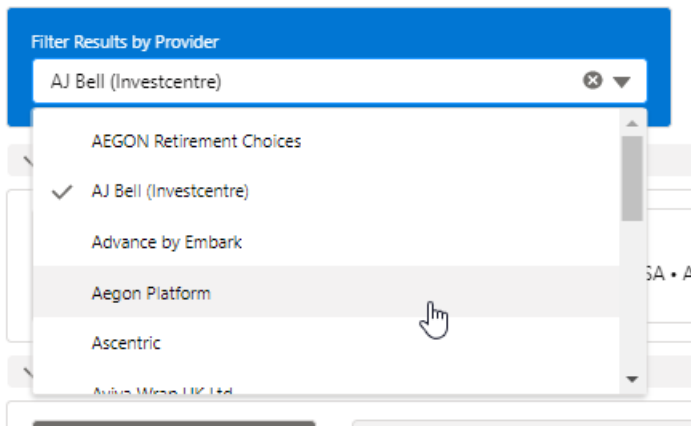
Filter Results by Product: Filter one or more products

- AEGON Retirement Choices
- AJ Bell (Investcentre)
- Advance by Embark
- Aegon Platform
- Ascentric

**James Hay Partnership**  
Modular Stocks & Shares ISA • Modular iSIPP

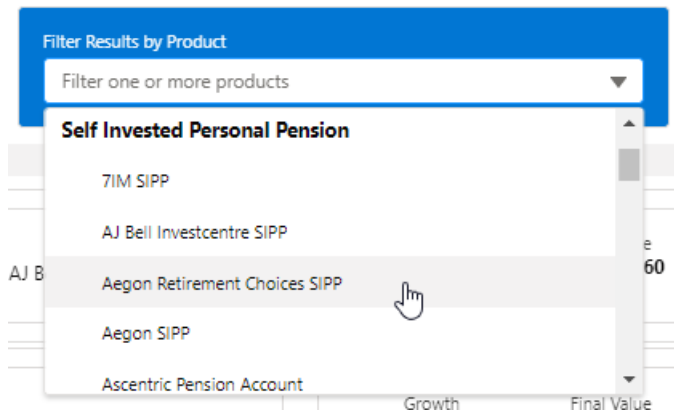
Filter Results by Provider: AJ Bell (Investcentre)

Click back into the drop down to select multiple providers

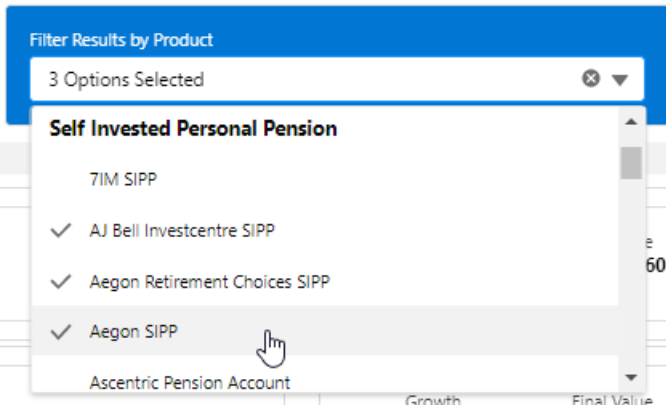


### Filter Results by Product

Filter the results by selecting one or more products in the drop down:



Multiple products can be selected:



## Sort Results by Value

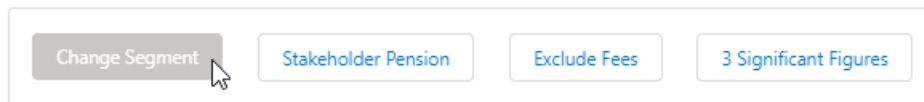
Select the button you would like to sort the results by:



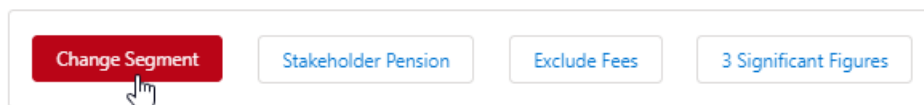
Note: It may seem like the results in the list are not updating. this may be because the Growth, Final Value, Charges and R.I.Y are already ascending.

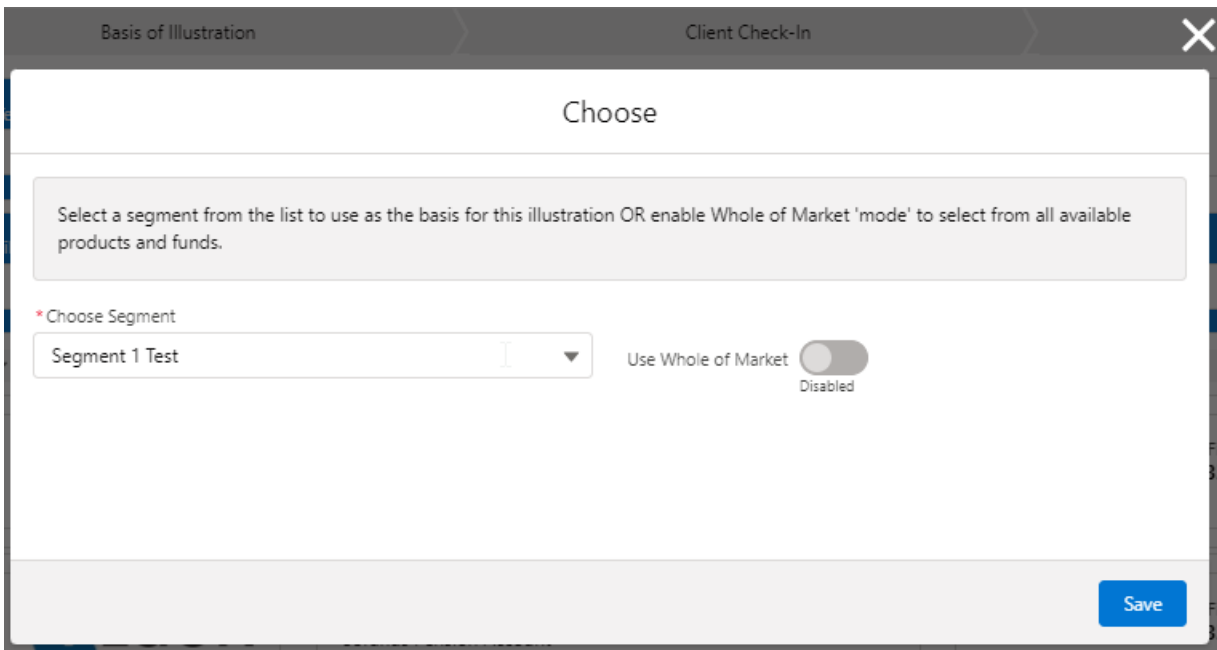
## Change Segment

This button will be disabled on Whole of Market Research:



If using a Central Investment Proposition, the button will be available to select and will allow you to change segment:





## Stakeholder Pension

When Stakeholder Pension is selected, it will be displayed at the top of the results screen:

Change Segment Stakeholder Pension Exclude Fees 3 Significant Figures

Term: 10 Update Results

Change Segment Stakeholder Pension Exclude Adviser Fees 3 Significant Figures Report

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % Final Value £ Charges £ R.I.Y %

Stakeholder Pension		1 of 1 Results			
	<b>Stakeholder Pension</b> Basic Pension for Comparison Purposes	Growth 3.70%	Final Value £321,672.22	Total Fees £40,104.97	R.I.Y 1.30%

▼ Platforms 27 of 27 Results

<b>7IM</b>	<b>Seven Investment Management</b> ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	R.I.Y 0.10%	+
<b>7IM</b>	<b>Seven Investment Management</b> ISA (Stocks and Shares) • Modular ISIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
<b>7IM</b>	<b>Seven Investment Management</b> ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	Growth 4.80%	Final Value £418,181.31	Total Fees £7,198.53	R.I.Y 0.20%	+

If a Retirement wrapper is not added to the research, **Stakeholder Pension** button will be disabled.

## Exclude Fees

When **Exclude Fees** is selected, the results screen will recalculate to reflect values based on zero

adviser charges.

Change Segment Stakeholder Pension Exclude Fees 3 Significant Figures

Term: 10 Update Results

Change Segment Stakeholder Pension Exclude Adviser Fees 3 Significant Figures Report

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % Final Value £ Charges £ R.I.Y %

Platforms 27 of 27 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
7iM	Seven Investment Management ISA (Stocks and Shares) • 7iM SIPP	4.90%	£421,714.00	£3,665.84	0.10%
7iM	Seven Investment Management ISA (Stocks and Shares) • Modular iSIPP	4.84%	£419,422.76	£5,957.08	0.16%
7iM	Seven Investment Management ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	4.80%	£418,181.31	£7,198.53	0.20%
P1 PLATFORM	P1 Investment Management P1 ISA • The P1 SIPP	4.76%	£416,601.28	£8,778.56	0.24%

### 3 Significant Figures

When selected, 3 significant will be displayed in the Results.

Change Segment Stakeholder Pension Exclude Fees 3 Significant Figures

Term: 10 Update Results

Change Segment Stakeholder Pension Exclude Adviser Fees 3 Significant Figures Report

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % Final Value £ Charges £ R.I.Y %

Platforms 27 of 27 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
7iM	Seven Investment Management ISA (Stocks and Shares) • 7iM SIPP	4.9%	£422,000	£3,670	0.1%
7iM	Seven Investment Management ISA (Stocks and Shares) • Modular iSIPP	4.84%	£419,000	£5,960	0.16%
7iM	Seven Investment Management ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	4.8%	£418,000	£7,200	0.2%
P1 PLATFORM	P1 Investment Management P1 ISA • The P1 SIPP	4.76%	£417,000	£8,780	0.24%

