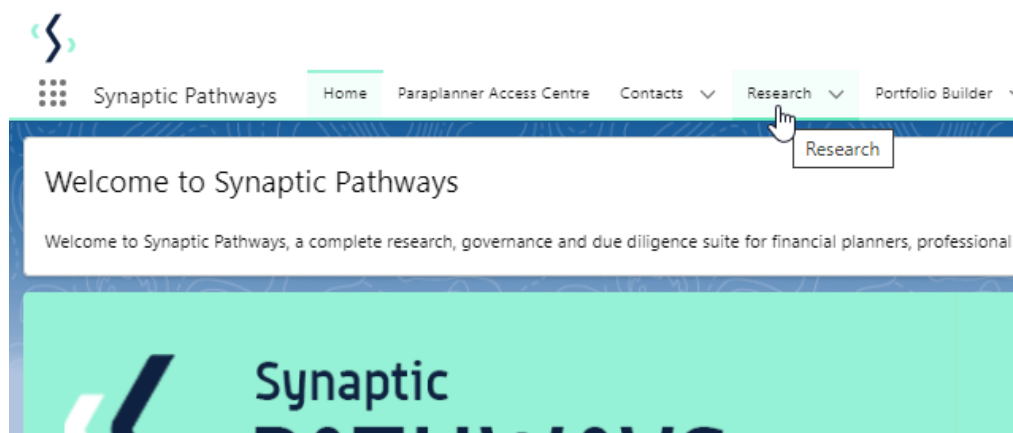


Comparison & Ex-Ante using a CIP - Creating in the research tab

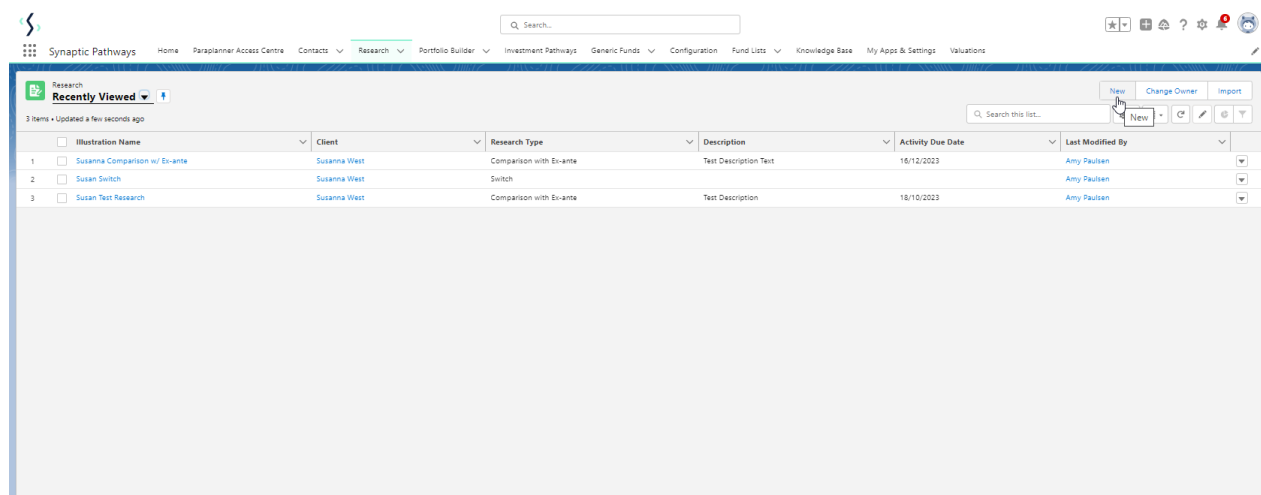
Last Modified on 16/10/2023 11:46 am BST

Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create a comparison with ex-ante scenario in the Research tab, click into the tab from the Homepage:



All existing research will be listed. Click **New** to create new research:



If you would like to run a comparison with an ex-ante report, select the first option. If you wish to create an ex-ante report without the comparison, select the second option:

New Research

Select a record type

- Comparison with Ex-ante
Select this option to compare platforms and products BEFORE executing an Illustration as a single or multiple wrapper report
- Ex-ante (Pre-Sales)
Select this option to create an Ex-ante (pre-sales) illustration for a single product
- Switch
Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.

As we have created research within the Research tab, you will need to search for the client:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client

Recent Contacts

- Susanna West
- Test Client
- Test Client1
- Steve Test
- Ben Smith
-

Note - Client field will already be completed if research is created directly in the contact record.

Complete the remaining fields:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client ↶
 ✕

* Illustration Name ↶

* Term ↶

Description

Activity Due Date
 📅

Save:

New Research: Comparison with Ex-ante

* = Required Information

Information

* Client ↶
 ✕

* Illustration Name ↶

* Term ↶

Description ↶

Activity Due Date ↶
 📅

✔ Research "Susanna Comparison w/ Ex-ante" was created.
✕

As we have configured a Central Investment Strategy, we will need to choose whether we use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.

Choose

Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds.

* Choose Segment

Select an Option

Use Whole of Market Disabled

Segment 1

Save

Once the segment is selected, **Save**

This will take you directly into the research:

The screenshot shows the Synaptic research interface. At the top, there is a navigation bar with various menu items and a search bar. Below the navigation bar, the main content area is titled 'Research' and 'Susanna Comparison w/Ex-ante CIP'. The interface is divided into several tabs: 'Investments', 'Trades', 'Fees', and 'AUM'. The 'Investments' tab is active, showing a list of investments and a 'Add Investment' button. The 'Review' tab is also visible, showing a large illustration of a cactus and a sun. The 'Ex-ante Results' section is visible, with a note to 'Add or include investments to see comparison results.' At the bottom, there are 'Cancel' and 'Continue to Ex-ante Illustration' buttons.

The segment can be found in the bar at the top of the screen:

Client	Description	Illustration Type	Segment Name	Policy Type
Susanna West	Test Description	Segment	Segment 1	