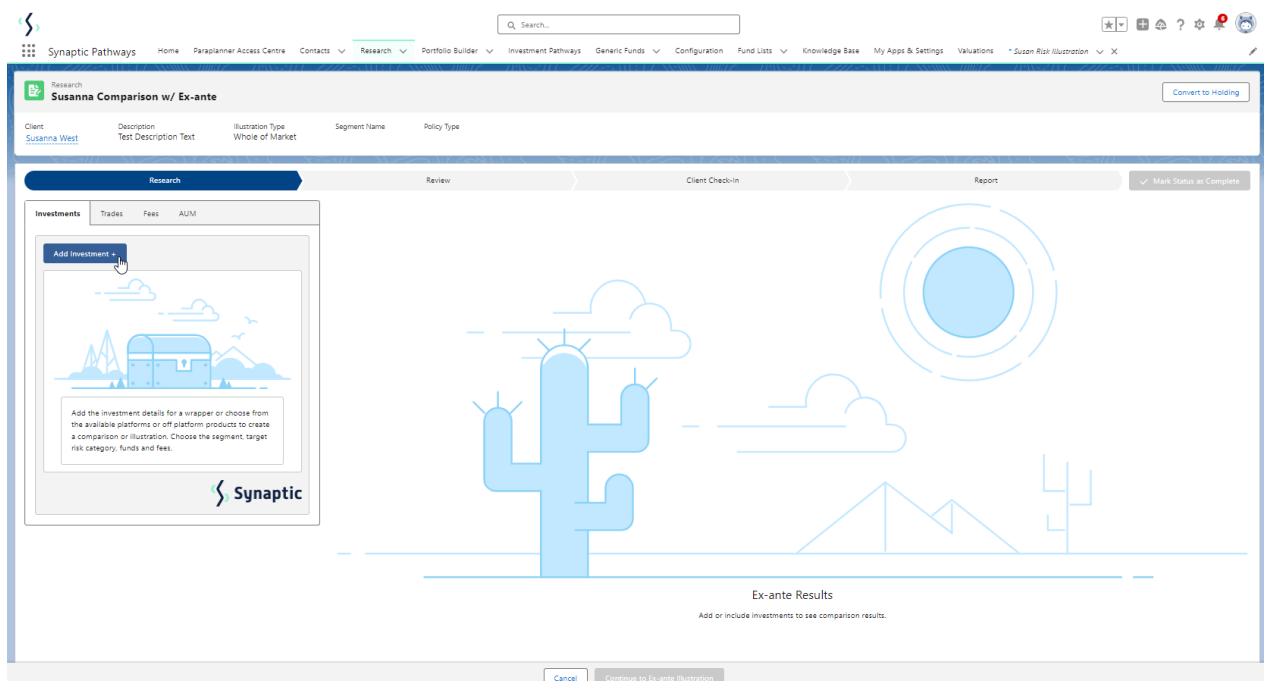


Comparison & Ex-Ante using a CIP - Add Investment

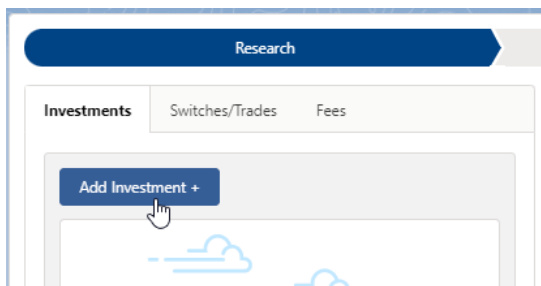
Last Modified on 16/10/2023 12:03 pm BST

This article explains how to add investments to Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup the CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles [here](#).

Once the Research has been created, you can start to add Investments to Research. See articles on how to create Research - [Comparison & Ex-Ante using a CIP- Creating through the homepage](#), [Comparison & Ex-Ante using a CIP - Creating in the research tab](#) or [Comparison & Ex-Ante using a CIP - Creating research within a client record](#)



Add investment through the **Add Investment +** button:



An Adviser Fees box will appear:

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step Add Fees Per Wrapper Inactive

Adviser Fees
Adviser fees are pre-populated from the chosen segment if present. You can change or add fees below.

Initial Fee % £ Regular Annual Fee % £ One off Fee for Advice % £

Fee on Regular Contribution % £ Over How Many Contributions

If you are going to add multiple investments to the comparison, you can either specify you would like to set fees by individual investment or by research.

Add Fees Per Wrapper will allow you to enter the adviser fees against the individual investment.

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step Add Fees Per Wrapper Active

If you would like to apply the fees to the research, enter the details below and **Continue**.

Note: Fees can be updated in the Fees tab in the research.

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step Add Fees Per Wrapper Inactive

Adviser Fees
Adviser fees are pre-populated from the chosen segment if present. You can change or add fees below.

Initial Fee % £ Regular Annual Fee % £ One off Fee for Advice % £

Fee on Regular Contribution % £ Over How Many Contributions

For this example, we will add the fees per individual investment.

Adviser Fees

If you are going to add multiple investment wrappers to the comparison illustration and you would like to specify the Adviser Fees per Investment Wrapper then please enable the toggle before selecting continue, otherwise you can optionally add the fees below now or update later in the fees tab on the research step

Add Fees Per Wrapper Active

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

<p>* Choose Wrapper Type</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> Select an Option ▼ </div>	<p>* Choose Target Risk Category</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> 6 - Balanced (High End) ▼ </div>
<p>* Objectives & Needs</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> Select an Option ▼ </div>	<p>* Ability to Bear Losses</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> Select an Option ▼ </div>

Complete the **Wrapper Type, Target Risk Category, Objective & Needs** and **Ability to Bear Losses**:

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

<p>* Choose Wrapper Type</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> Select an Option ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> Investment Bond Offshore Bonds Individual Savings Accounts Income Drawdown General Investment Account <li style="background-color: #f0f0f0; padding: 2px;">Pensions ▶ </div>	<p>* Choose Target Risk Category</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> 6 - Balanced (High End) ▼ </div> <p>* Ability to Bear Losses</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> Select an Option ▼ </div>
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Target Risk Category will automatically pull through if a attitude to risk questionnaire has been completed and set to default.

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

6 - Balanced (High End)

* Objectives & Needs

Select an Option

* Ability to Bear Losses

Select an Option

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

6 - Balanced (High End)

* Objectives & Needs

Select an Option

* Ability to Bear Losses

Select an Option

Preservation

Growth

Income

Hedged

Leveraged Return

Investment Segment, Wrapper & Risk Category

Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type

Pensions

* Choose Target Risk Category

6 - Balanced (High End)

* Objectives & Needs

Growth

* Ability to Bear Losses

Select an Option

Limited Capital Loss

No Capital Guarantee

Loss Beyond Capital

Once all fields have been completed, further detail will appear below:

Choose Wrapper Type & Investment Details

Investment Segment, Wrapper & Risk Category
Choose an investment wrapper and complete the required fields to add this wrapper to the comparison of platforms and off platform products.

* Choose Wrapper Type: Pensions
* Choose Target Risk Category: 6 - Balanced (High End)
* Objectives & Needs: Growth
* Ability to Bear Losses: No Capital Guarantee

Investment Details
Objective / Goal description: Test Objective/Goal Description

* Initial Amount £: |
Transfer In Amount £: |

Contributions
Regular Contribution £: | Frequency of Contribution: Monthly
Indexation Rate for Contribution: None Indexation Rate %: 0.00%

Withdrawals
Regular Withdrawal £: | Frequency of Withdrawal: Monthly
Indexation Rate for Withdrawal: None Indexation Rate %: 0.00%

Summary

Total Initial + Transfer	Total of Contributions	Total of Withdrawals	Net Investment Over Term
-	-	-	-

Cancel Save

Enter the **Investment Details**.

Investment Details
Objective / Goal description: Test Objective/Goal Description

* Initial Amount £: £10,562.00
Transfer In Amount £: £200,263.00

Contributions
Regular Contribution £: £200.00
Frequency of Contribution: Monthly
Indexation Rate for Contribution: Retail Price Index (RPI) 9%
Indexation Rate %: 9.00%

Withdrawals
Regular Withdrawal £: £500.00
Frequency of Withdrawal: Annually
Indexation Rate for Withdrawal: Retail Price Index (RPI) 9%
Indexation Rate %: 9.00%

Summary

Total Initial + Transfer	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£210,825.00	£36,463.03	-£7,596.46	£239,691.57

Once entered, a summary will be calculated:

Summary			
Total Initial + Transfer	Total of Contributions	Total of Withdrawals	Net Investment Over Term
£210,825.00	£36,463.03	-£7,596.46	£239,691.57

Select the **Portfolio, Fund** or **Generic Fund** in the **Fund Selection** area:

Please note - As we have selected a segment, only funds and portfolios configured in the CIP will be returned. If nothing is returned, check that the fund/portfolio has been added to the CIP and assigned to the chosen segment. See articles [Central Investment Proposition - Adding Portfolios](#), [Central Investment Proposition - Adding Fund Lists](#), [Central Investment Proposition - Adding Portfolios to a Segment & Central Investment Proposition - Adding Fund Lists to a Segment](#).



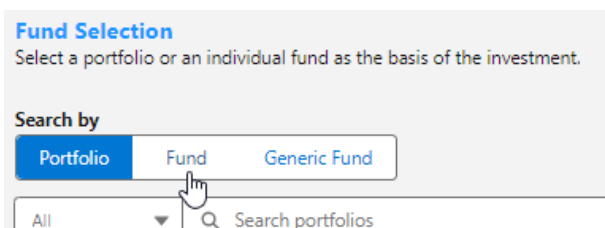
Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund Generic Fund

All Search portfolios

Choose either **Portfolio**, **Fund** or **Generic Fund**



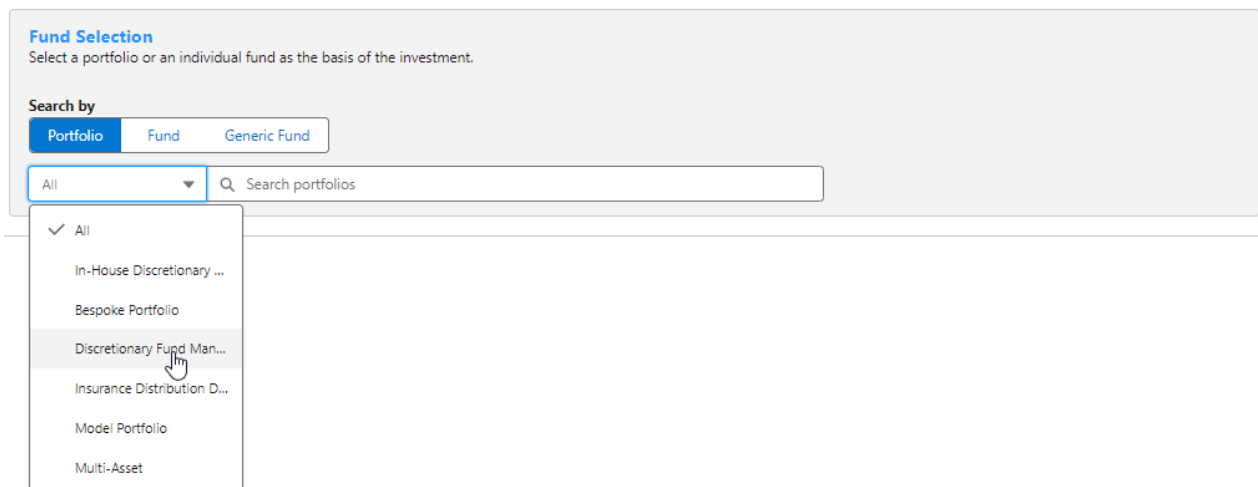
Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund Generic Fund

All Search portfolios

If Portfolio is selected, you are able to select the type of portfolio in the **All** drop down:



Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

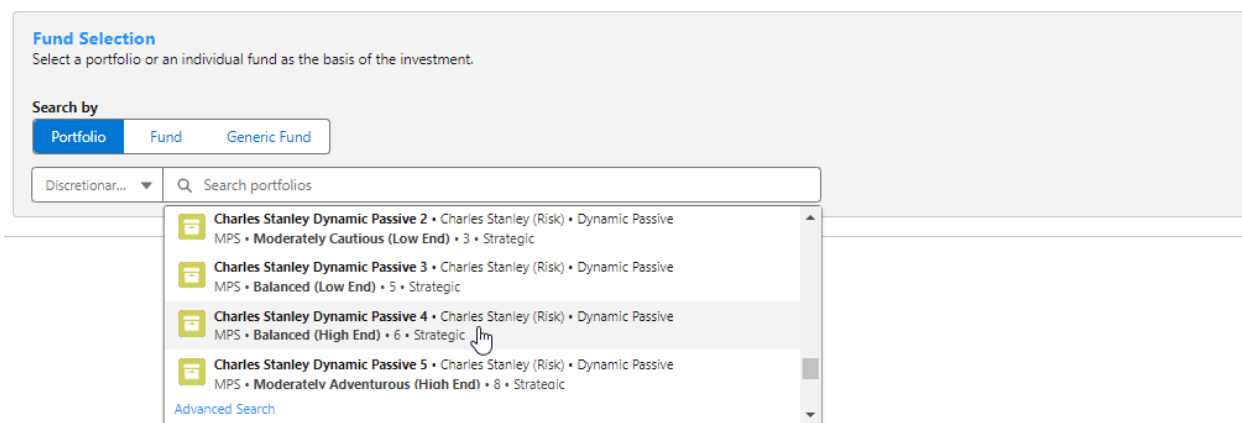
Portfolio Fund Generic Fund

All Search portfolios

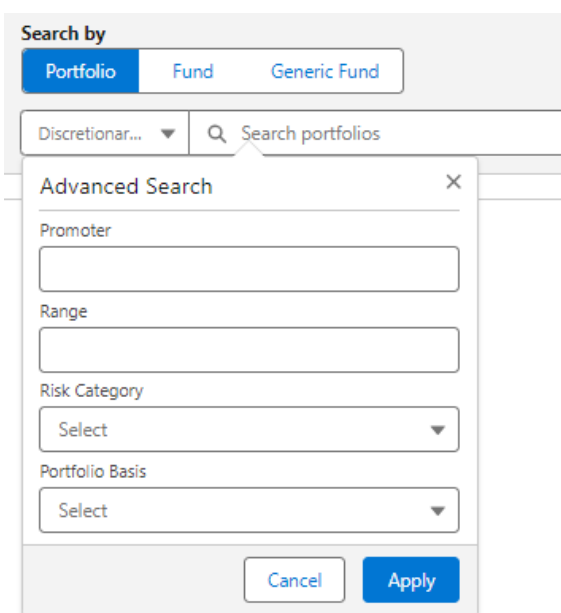
- ✓ All
- In-House Discretionary ...
- Bespoke Portfolio
- Discretionary Fund Man...
- Insurance Distribution D...
- Model Portfolio
- Multi-Asset

In this example, we have selected **Discretionary Fund Managers**.

When searching, only Portfolios offered by Discretionary Fund Managers will be returned:



Advanced Search allows you narrow the search by **Promoter, Range, Risk Category & Portfolio Basis**:



If **Risk Category** is set, this will return DFM portfolios with a risk rating of **Balanced (High End)**.

Click **Apply**:

Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund Generic Fund

Discretionar... Search portfolios

Advanced Search X

Promoter

Range

Risk Category

Balanced (High End)

Portfolio Basis

Select

Cancel Apply

Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund Generic Fund

Discretionar... Filters: 1 X Search portfolios

- WealthSelect Managed Passive 7 • Quilter Investors (Risk) • WealthSelect Passive MPS • Balanced (High End) • 6 • Strategic
- WealthSelect Responsible Passive 7 • Quilter Investors (Risk) • WealthSelect Responsible Passi... MPS • Balanced (High End) • 6 • Strategic
- abrdn Index MPS 3 • abrdn Capital (Risk) • Index MPS • Balanced (High End) • 6 • Strategic
- abrdn MPS 3 • abrdn Capital (Risk) • MPS MPC • Balanced (High End) • 6 • Strategic

Advanced Search

Fund Selection
Select a portfolio or an individual fund as the basis of the investment, then select the growth, the default is Actuarial determined taxable and non-taxable growth rates for the master asset classes by weighting. For DFM, Multi-Asset and IDD funds, the stochastic growth rate is returned alternatively specify a Custom growth rate.

Search by

Portfolio Fund Generic Fund

WealthSelect Managed Blend 7 • Quilter Investors (Risk) • WealthSelect MPS • Balanced (High End) • 6 • Strategic X

Actuarial Stochastic Custom

7.78%

If selecting a fund, click **Fund**:

Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund Generic Fund

Search for funds using the fund name or fund code. If you would like to return parent only funds, tick the box:

Fund Selection
Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund Generic Fund

Only Return Parent

Q ACDQ

Vanguard LifeStrategy 60% Equity A Shares Acc
GB00B3TYHH97 • ACDQ • Vanguard Investments UK Limite

Fund Selection
Select a portfolio or an individual fund as the basis of the investment, then select the growth, the default is Actuarial determined taxable and non-taxable growth rates for the master asset classes by weighting. For DFM, Multi-Asset and IDD funds, the stochastic growth rate is returned alternatively specify a Custom growth rate.

Search by

Portfolio Fund Generic Fund

Vanguard LifeStrategy 60% Equity A Shares Acc
GB00B3TYHH97 • ACDQ • Vanguard Investments UK Limite

Lock Share Class

Actuarial Stochastic Custom

0.00%

Click the **Lock Share Class** button if you would like the system to use the exact fund selected. If leaving unselected, the system will find a cheaper version of the fund in the research.

Fund Selection
Select a portfolio or an individual fund as the basis of the investment, then select the growth, the default is Actuarial determined taxable and non-taxable growth rates for the master asset classes by weighting. For DFM, Multi-Asset and IDD funds, the stochastic growth rate is returned alternatively specify a Custom growth rate.

Search by

Portfolio Fund Generic Fund

Vanguard LifeStrategy 60% Equity A Shares Acc
GB00B3TYHH97 • ACDQ • Vanguard Investments UK Limite

Lock Share Class

Actuarial Stochastic Custom

0.00%

You can set the growth rate. The system will default to Actuarial which is determined taxable and non-taxable growth rates for the master asset class by weighting. For DFM, Multi-Asset and IDD funds, the stochastic growth rate is returned. Alternatively, specify a Custom growth rate:

Actuarial Stochastic Custom

0.00%

Click **Save:**

Choose Wrapper Type & Investment Details

Investment Details

Objective / Goal description

Test Goal Description Text

* Initial Amount £

£200,000

Transfer In Amount £

Contributions

Regular Contribution £

£200

Frequency of Contribution

Monthly

Indexation Rate for Contribution

Retail Price Index (RPI) 8.2%

Indexation Rate %

8.20%

Withdrawals

Regular Withdrawal £

£500

Frequency of Withdrawal

Annually

Indexation Rate for Withdrawal

Retail Price Index (RPI) 8.2%

Indexation Rate %

8.20%

Summary

Total Initial + Transfer

£200,000.00

Total of Contributions

£35,099.70

Total of Withdrawals

-£7,312.44

Net Investment Over Term

£227,787.27

Fund Selection

Select a portfolio or an individual fund as the basis of the investment.

Search by

Portfolio Fund

Royal London UK All Share Tracker Z Acc
GB00B533V415 • DAZ7 • Royal London Unit Tst Mgrs

Cancel

Save

Once saved, the results will be displayed. Please note - As we have used a Central Investment Proposition and selected a segment, only platforms, off platform products, portfolios and funds configured in the CIP will pull through.