

# Comparison & Ex-Ante using a CIP - Research Screen

13/10/2025 2:42 pm BST

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

In the example below, we have added a **Pension** as an investment. See article [Comparison with Ex-Ante using a CIP - Add Investment](#) for details on adding investments to your Research.

The screenshot shows the Synaptic Research interface. The top navigation bar includes links to Synaptic Pathways, Home, Paraplanner Access Centre, Contacts, Research (selected), Portfolio Builder, Investment Pathways, Generic Funds, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. The main header area displays the client name 'Susanna West' and the description 'Test Description Text'. The 'Research' tab is active, showing a list of investments. The 'Pensions' investment is highlighted, showing an investment amount of £239,691.57 and a risk category of 'Balanced (High End)'. The 'Platforms' section displays a list of 41 results, including 'P1 Investment Management', 'James Hay Partnership', 'Raymond James Investment Services Ltd', and 'Fidelity Adviser Solutions'. Each platform entry shows growth, final value, total fees, and RLY. The bottom of the screen has buttons for 'Cancel' and 'Continue to Ex-ante Illustration'.

Multiple investments can be added through the **Add Investment +** button.

As you add investments, the list of platforms will update to display investments added. At the bottom of the list there will be a platform & off platform combination.

**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.**

In the example below, we have added a **Pensions** and **Individual Savings Account**. The platforms listed show the Pension and ISAs included:

Synaptic Pathways

Search...

Home | Paraplanner Access Centre | Contacts | Research | Portfolio Builder | Investment Pathways | Generic Funds | Configuration | Fund Lists | Knowledge Base | My Apps & Settings | Valuations

Research

Susanna Comparison w/ Ex-ante

Client: Susanna West | Description: Text Description Text | Illustration Type: Whole of Market | Segment Name: | Policy Type: | Convert to Holding

Research | Review | Client Check-in | Report

Investments | Trades | Fees | AUM

Add Investment +

Pensions

Investment Amount: £239,691.57 | Risk Category: Balanced (High End) | Target Fund: Vanguard LifeStrategy 60% Equity A Shares Acc

Individual Savings Accounts

Investment Amount: £22,620.00 | Risk Category: Balanced (High End) | Target Fund: Vanguard LifeStrategy 40% Equity A Shares Acc

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 £ | Total Fees £ | R.I.Y %

Platforms

37 of 37 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
PLATFORM	P1 Investment Management The P1 SIPP • P1 ISA	3.84%	£373,243.65	£40,595.43	1.16%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular ISPP • Modular Stocks & Shares ISA	3.78%	£371,337.17	£42,501.90	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity Personal Pension • Fidelity (No Investor Fee)	3.78%	£371,269.31	£42,569.76	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity (No Investor Fee) • Fidelity Personal Pension	3.78%	£371,269.31	£42,569.76	1.22%
Standard Life	Elevate Elevate Pension Investment Account • Elevate Stocks & Shares ISA - Explicit	3.77%	£370,938.43	£42,900.64	1.23%

Cancel | Continue to Ex-ante Illustration

Lowest R.I.Y Platform and Off Platform Combination will be displayed at the bottom of the list:

Lowest R.I.Y Platform and Off Platform Combination

1 of 1 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
Lowest R.I.Y Combination	AJ Bell (Investcentre) • AJ Bell (Investcentre)	3.49%	£374,743.57	£39,095.50	1.13%
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre Investment ISA	3.12%	£28,904.64	£4,201.60	1.88%
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP	3.94%	£345,838.94	£34,893.90	1.06%

Growth, Final Value, Total Fees and R.I.Y are displayed next to each result:

Platforms

37 of 37 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
PLATFORM	P1 Investment Management The P1 SIPP • P1 ISA	3.84%	£373,243.65	£40,595.43	1.16%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular ISPP • Modular Stocks & Shares ISA	3.78%	£371,337.17	£42,501.90	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity Personal Pension • Fidelity (No Investor Fee)	3.78%	£371,269.31	£42,569.76	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity (No Investor Fee) • Fidelity Personal Pension	3.78%	£371,269.31	£42,569.76	1.22%
Standard Life	Elevate Elevate Pension Investment Account • Elevate Stocks & Shares ISA - Explicit	3.77%	£370,938.43	£42,900.64	1.23%
Quilter	Quilter Collective Retirement Account • ISA	3.77%	£370,899.76	£42,939.31	1.23%
Quilter	Quilter ISA • Collective Retirement Account	3.77%	£370,899.76	£42,939.31	1.23%

