

Comparison & Ex-Ante using a CIP - Research Filtering

Last Modified on 05/05/2022 12:28 pm BST

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

The screenshot shows the Synaptic Pathways research interface. It features a navigation bar with options like 'Research', 'Portfolio Builder', and 'Investment'. The main area is titled 'Test Illustration Apr22' and contains several sections: 'Investments' with a list of accounts (Individual Savings Accounts and Self Invested Personal Pension), 'Filter Results by Provider' and 'Filter Results by Product' dropdowns, and 'Sort Results by Value' options (Growth %, Final Value £, Charges £, RLY %). A table of results is displayed, showing details for various investment products from providers like 7IM and PLATFORM. Callouts provide detailed instructions for each of these features.

Term

Term

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 £ | R.I.Y %

Platforms 27 of 27 Results

	Seven Investment Management ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	R.I.Y 0.10%	+
	Seven Investment Management ISA (Stocks and Shares) • Modular iSIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
	Seven Investment Management 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%	+
	P1 Investment Management P1 ISA • The P1 SIPP	Growth 4.76%	Final Value £416,601.28	Total Fees £8,778.56	R.I.Y 0.24%	+
	AJ Bell (Investcentre) AJ Bell Investcentre Investment ISA • AJ Bell Investcentre SIPP	Growth 4.72%	Final Value £415,275.55	Total Fees £10,104.29	R.I.Y 0.28%	+

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

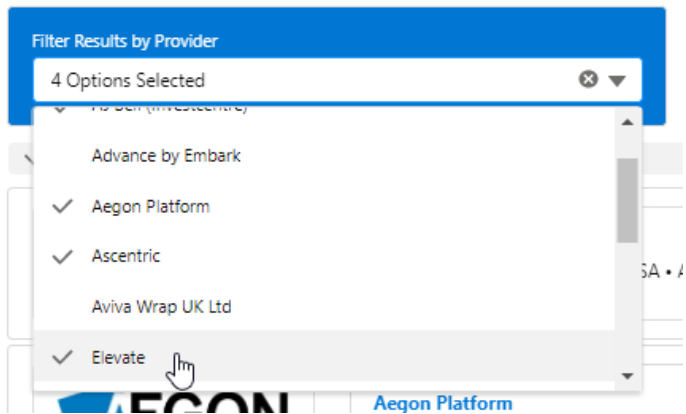
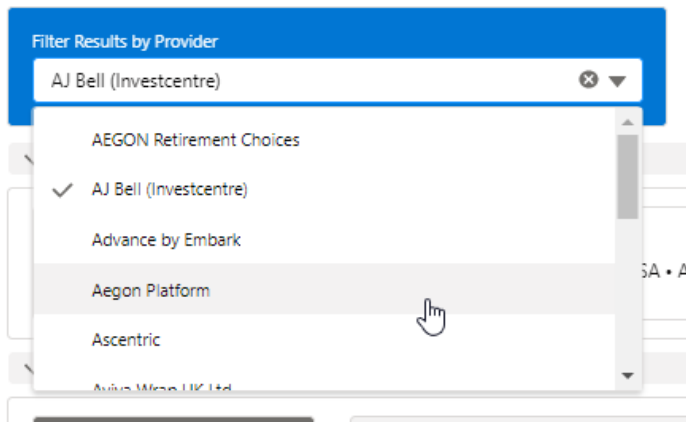
Filter Results by Product: Filter one or more products

- AEGON Retirement Choices
- AJ Bell (Investcentre) 👤
- Advance by Embark
- Aegon Platform
- Ascentric
- James Hay Partnership

James Hay Partnership
Modular Stocks & Shares ISA • Modular iSIPP

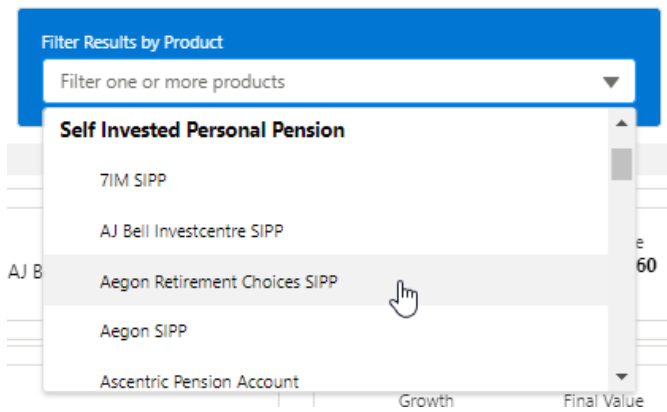
Filter Results by Provider: AJ Bell (Investcentre) ✕ ▼

Click back into the drop down to select multiple providers

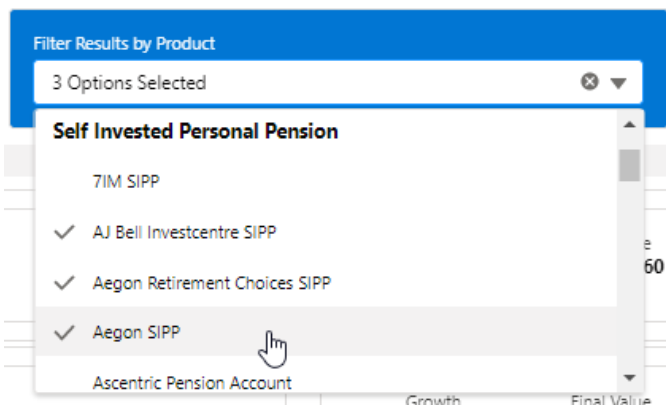


Filter Results by Product

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



Multiple products can be selected:



Sort Results by Value

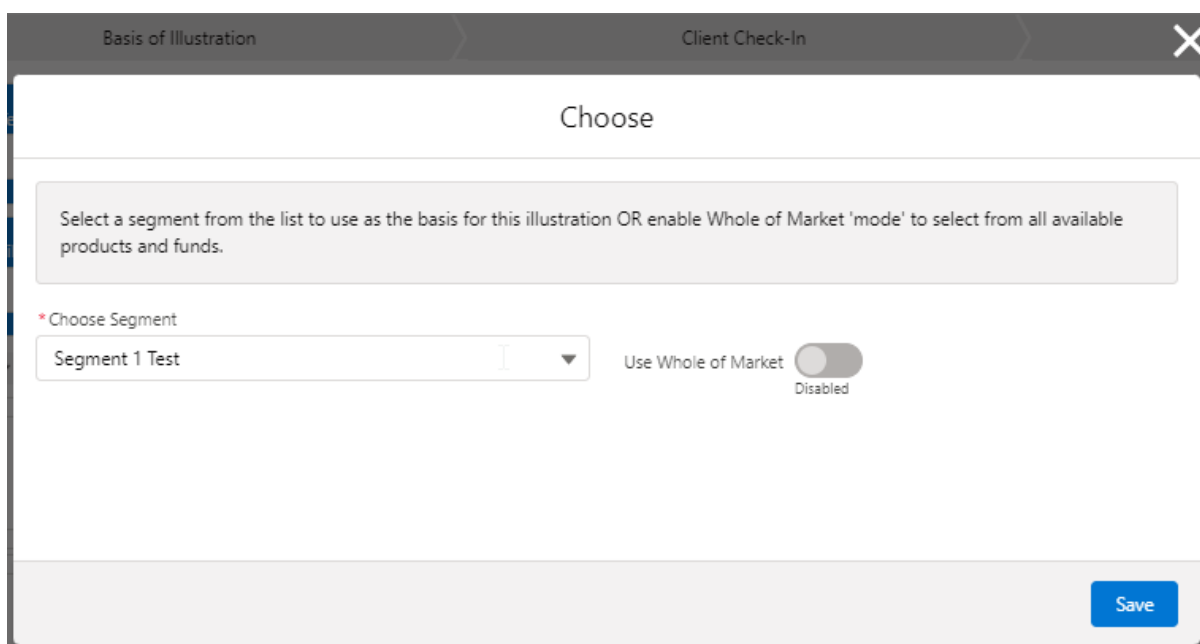
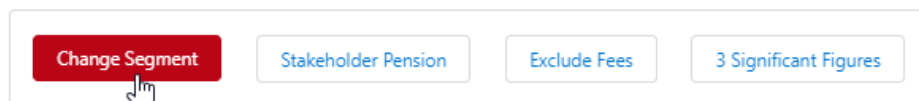
Select the button you would like to sort the results by:



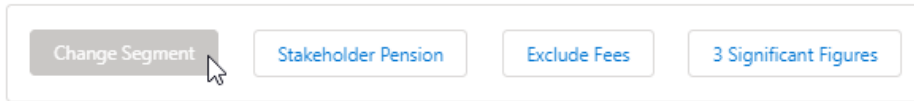
Note: It may seem like the results in the list are not updating. this may be because the Growth, Final Value, Charges and R.I.Y are already ascending.

Change Segment

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



This button will be disabled on Whole of Market Research:



Stakeholder Pension

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

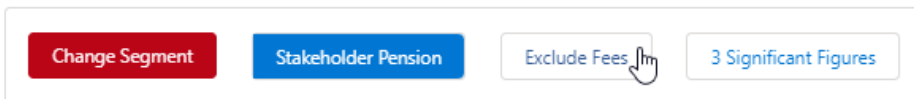
Stakeholder Pension		1 of 1 Results			
	Stakeholder Pension Basic Pension for Comparison Purposes	Growth 3.70%	Final Value £321,672.22	Total Fees £40,104.97	R.I.Y 1.30%

Platforms		27 of 27 Results				
7IM	Seven Investment Management ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	R.I.Y 0.10%	+
7IM	Seven Investment Management ISA (Stocks and Shares) • Modular ISIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
7IM	Seven Investment Management 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.



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

	Seven Investment Management ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	R.I.Y 0.10%	+
	Seven Investment Management ISA (Stocks and Shares) • Modular iSIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
	Seven Investment Management 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%	+
	P1 Investment Management P1 ISA • The P1 SIPP	Growth 4.76%	Final Value £416,601.28	Total Fees £8,778.56	R.I.Y 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

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