

# Comparison & Ex-Ante using a CIP - Trades

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Add switching information through the **Trades** tab.

The screenshot shows the Synaptic research tool interface. The top navigation bar includes 'Research', 'Review', 'Client Check-in', and 'Report'. The 'Research' tab is active, and the 'Trades' sub-tab is selected. The main content area displays a list of investment platforms with their respective performance metrics. The 'Trades' tab is highlighted, indicating the next step in the process.

Platform	Product	Growth	Final Value	Total Fees	R.I.Y.
PLATFORM	P1 Investment Management The P1 SPP + 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 Adviser Solutions	Fidelity Personal Pension + Fidelity (No Investor Fee)	3.78%	£371,269.31	£42,569.76	1.22%
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%

The 'Trades' tab configuration form is shown. It includes fields for 'Trades (Buy/Sell)', 'Frequency of Trades', and '% of Current Balance to Trade'. A 'Set Trades +' button is visible at the bottom.

**Trades**

+ Add Trades (Optional)

Provide a number of trades, the frequency and percentage of the value balance to trade.

Trades (Buy/Sell)

0

Frequency of Trades

Monthly

% of Current Balance to Trade

0.00%

Value Balance is determined during the R.I.Y calculation when the trade is applied.

Set Trades +

The **Set Trades +** button will become available once information is complete. **Set Trades +** to apply to the Results:

Investments **Trades** Fees AUM

[+ Add Trades \(Optional\)](#)  
Provide a number of trades, the frequency and percentage of the value balance to trade.

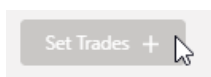
Trades (Buy/Sell)

Frequency of Trades

% of Current Balance to Trade

Value Balance is determined during the R.I.Y calculation when the trade is applied.

The button will be greyed out once applied.



Any changes to the information will make the button available again.

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