

# Ex-Ante - Research Filtering

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**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**

**Unselect/Select Investments** to include in the results

**Filters not needed on Ex-ante Research**

The screenshot shows a web interface for 'Test Illustration Ex-ante for 2022'. It includes a 'Research' tab, a 'Review' section with a 'Term' input (10) and 'Update Results' button, and a 'Client Check-In' section with buttons for 'Change Segment', 'Stakeholder Pension', 'Exclude Adviser Fees', and '3 Significant Figures'. A 'Report' button is also present. Below these are filters for 'Filter Results by Provider' and 'Filter Results by Product', and a 'Sort Results by Value' section with options for 'Growth %', 'Final Value £', 'Charges £', and 'R.L.Y %'. A table of results is shown, featuring 'AEGON' and 'Aegon Platform' with metrics like Growth (4.65%), Final Value (£339,651.80), Total Fees (£11,143.95), and R.L.Y (0.35%).

## Term

Term

When updating the term, click **Update Results**

Term

## Filter Results by Provider

Ex-Ante only Research is based on selecting a single product.

### Filter Results by Product

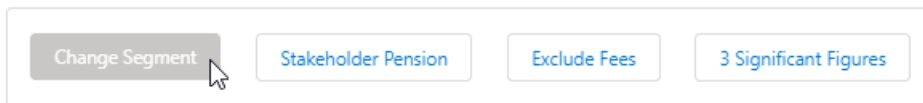
Ex-Ante only Research is based on selecting a single product.

### Sort Results by Value

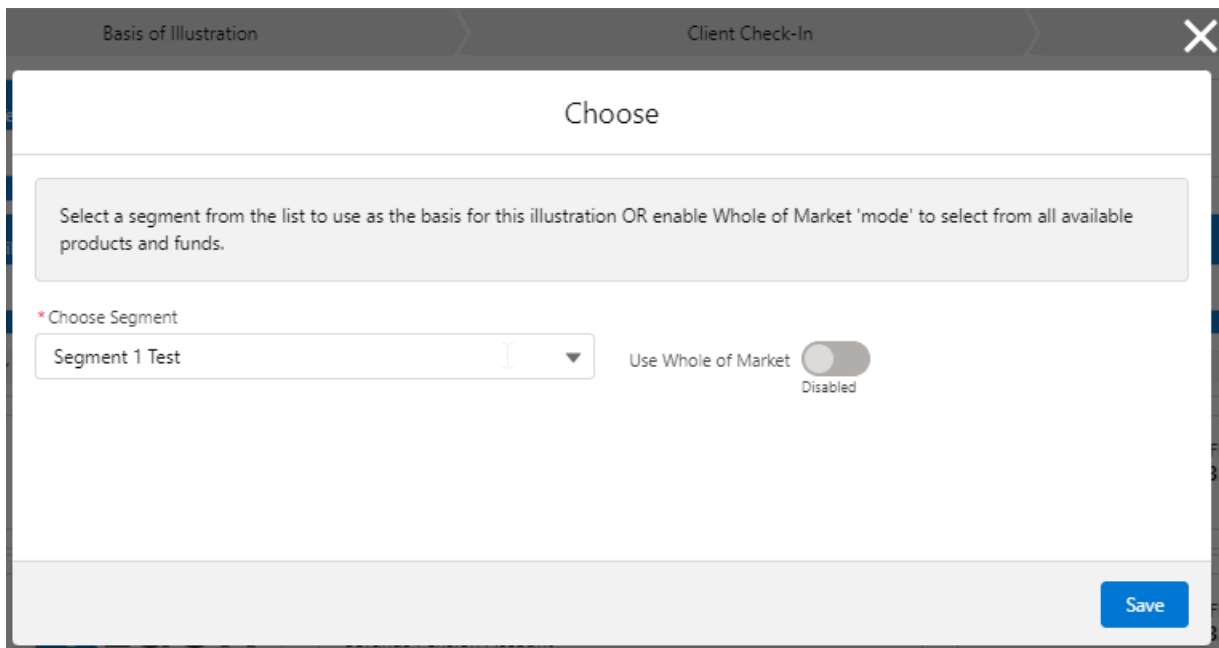
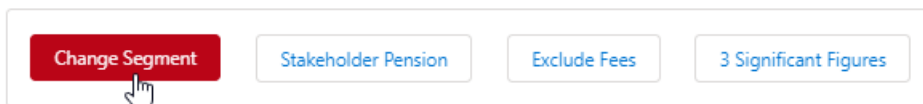
Ex-Ante only Research is based on selecting a single product.

### Change Segment

This button will be disabled on Whole of Market Research:

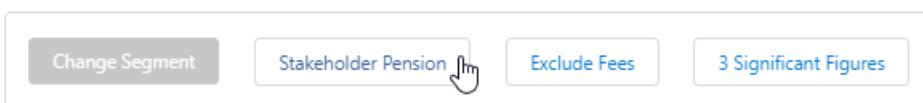


If using a Central Investment Proposition, the button will be available to select and will allow you to change segment:



### Stakeholder Pension

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



The screenshot shows the Synaptic research tool interface. At the top, there are tabs for 'Research', 'Review', 'Client Check-In', and 'Report'. Below these are navigation options: 'Investments', 'Switches/Trades', and 'Fees'. On the left, there's a sidebar for 'Self Invested Personal Pension' with an investment amount of £219,012.34 and a risk category of 'Moderately Caut...'. The main area has a 'Term' field set to 10. A row of buttons includes 'Change Segment', 'Stakeholder Pension' (which is highlighted), 'Exclude Adviser Fees', and '3 Significant Figures'. Below this are filter sections for 'Filter Results by Provider', 'Filter Results by Product', and 'Sort Results by Value'. The results table shows one result for 'Stakeholder Pension' with a growth of 3.71%, final value of £11,443.72, total fees of £39,352.02, and RLY of 1.29%. A 'Platforms' section below shows 'Aegon Platform' with a growth of 4.65%, final value of £39,651.80, total fees of £11,143.95, and RLY of 0.35%.

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.

A close-up of the button row from the screenshot above. The buttons are 'Change Segment', 'Stakeholder Pension', 'Exclude Fees' (which is highlighted with a mouse cursor), and '3 Significant Figures'.

This screenshot is identical to the first one, but the 'Exclude Adviser Fees' button is now highlighted with a mouse cursor. The results table below shows updated values: Growth 4.65%, Final Value £39,651.80, Total Fees £11,143.95, and RLY 0.35% for the 'Aegon Platform'.

### 3 Significant Figures

When selected, 3 significant will be displayed in the Results.

A close-up of the button row from the screenshot above. The buttons are 'Change Segment', 'Stakeholder Pension', 'Exclude Fees', and '3 Significant Figures' (which is highlighted with a mouse cursor).

This screenshot is identical to the previous one, but the '3 Significant Figures' button is now highlighted with a mouse cursor. The results table below shows further updated values: Growth 4.65%, Final Value £340,000, Total Fees £11,100, and RLY 0.35% for the 'Aegon Platform'.

