

Ex-Ante - Switches/Trades

Last Modified on 05/05/2022 3:45 pm BST

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

The screenshot shows the Synaptic Ex-Ante interface. At the top, there is a navigation bar with various menu items like 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', 'Valuations', and 'Central Investment Proposals'. Below this, the main content area is titled 'Research Test Illustration Ex-ante Apr22'. It features a 'Client Test' section with fields for 'Description' and 'Illustration Type'. The interface is divided into several tabs: 'Investments', 'Switches/Trades', and 'Fees'. The 'Switches/Trades' tab is currently active, showing a 'Term' field set to '10' and an 'Update Results' button. There are also filters for 'Provider' and 'Product', and a 'Sort Results by Value' section with options for 'Growth %', 'Final Value £', 'Charges £', and 'R.I.Y %'. A table of results is displayed, showing one platform: 'Aegon Platform' with a growth rate of 4.63%, a final value of £340,000, total fees of £11,100, and an R.I.Y of 0.35%. The Synaptic logo is visible in the bottom right corner of the interface.

This is a close-up of the 'Switches/Trades' tab. It features a header with three tabs: 'Investments', 'Switches/Trades', and 'Fees'. The 'Switches/Trades' tab is selected and highlighted. Below the header, there is a section titled '+ Add Trades (Optional)' with the instruction: 'Provide a number of trades, the frequency and percentage of the value balance to trade.' The form contains three input fields: 'Trades (Buy/Sell)' with a value of '0', 'Frequency of Trades' with a dropdown menu set to 'Monthly', and '% of Current Balance to Trade' with a value of '0.00%'. Below these fields, there is a note: 'Value Balance is determined during the R.I.Y calculation when the trade is applied.' At the bottom of the form, there is a button labeled 'Set Trades +'.

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

Investments **Switches/Trades** Fees

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

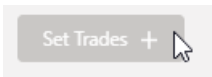
Trades (Buy/Sell)

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.



The button will become available again if any changes are made.
