

Switching - Results Screen

Last Modified on 18/10/2023 11:42 am BST

This article is a continuation of [Switching - Add Target Scheme](#)

Once the Target Scheme has been added, the results screen will display the Target Scheme information at the top of the screen.

The screenshot displays the 'Switching - Results Screen' interface. At the top, there are two main sections: 'Target Scheme' (blue header) and 'Outcome' (green header). The 'Target Scheme' section includes a sidebar with 'Investment', 'Switches/Trades', 'Fees', and 'Family AUM'. The main area shows 'Target Scheme' details: Product 'Comparison Basis', Term '10Yrs 3Mos', Target Portfolio 'Vanguard LifeStrategy 60% Equity A Shares Acc', and Risk Category 'Balanced'. The 'Outcome' section shows a 'Switch Result' summary: Critical Yield '-0.85%', Hurdle Rate '-2.35%', Growth Rate (Mid) '1.50%', and R.I.Y. '0.46%', with a 'Report' button.

Below these sections is the 'Results' section (blue header) with 'Comparison Report' and 'Update Results' buttons. The results are presented in a table format:

Category	Item	Growth	Final Value	Total Fees	R.I.Y.
Consolidated Ceding Schemes	Projection of aggregated schemes for the purpose of comparison	-1.32%	£291,987.12	£97,834.77	2.82%
	1 of 1 Results				
Stakeholder Pension	Basic Pension for Comparison Purposes	0.01%	£329,569.63	£47,556.39	1.49%
	1 of 1 Results				
Platforms	P1 Investment Management The P1 SIPP	1.04%	£361,602.02	£15,523.99	0.46%
	RAYMOND JAMES Raymond James Investment Services Ltd AJ Bell Investcentre SIPP	0.99%	£360,140.36	£16,985.66	0.51%

The cheapest option will automatically be selected, this has populated the Switch Result Outcome.

Target Scheme

Target Scheme

Product	Term
Comparison Basis	10Yrs 3Mos
Target Portfolio	Risk Category
Vanguard LifeStrategy 60% Equity A Shares Acc	Balanced

Outcome

Switch Result

Critical Yield	Hurdle Rate
-0.85%	-2.35%
Growth Rate (Mid)	R.I.Y
1.50%	0.46%

[Report](#)

Results

[Comparison Report](#)
[Update Results](#)

Consolidated Ceding Schemes		Growth	Final Value	Total Fees	R.I.Y
Projection of aggregated schemes for the purpose of comparison		-1.32%	£291,987.12	£97,834.77	2.82%
Stakeholder Pension 1 of 1 Results					
Stakeholder Pension		Growth	Final Value	Total Fees	R.I.Y
Basic Pension for Comparison Purposes		0.01%	£329,569.63	£47,556.39	1.49%
Platforms 41 of 41 Results					
P1 Investment Management		Growth	Final Value	Total Fees	R.I.Y
The P1 SIPP		1.04%	£361,602.02	£15,523.99	0.46%

This will include the critical yield, hurdle rate, growth rate (mid rate) and R.I.Y.

Outcome

Switch Result

Critical Yield	Hurdle Rate
-0.85%	-2.35%
Growth Rate (Mid)	R.I.Y
1.50%	0.46%

[Report](#)

Alternative platform/off platform products can be selected by ticking the + next to the product

Results						Comparison Report	Update Results
	Consolidated Cedding Schemes Projection of aggregated schemes for the purpose of comparison	Growth -1.32%	Final Value £291,987.12	Total Fees £97,834.77	R.I.Y 2.82%		
Stakeholder Pension						1 of 1 Results	
	Stakeholder Pension Basic Pension for Comparison Purposes	Growth 0.01%	Final Value £329,569.63	Total Fees £47,556.39	R.I.Y 1.49%		
Platforms						41 of 41 Results	
	P1 Investment Management The P1 SIPP	Growth 1.04%	Final Value £361,602.02	Total Fees £15,523.99	R.I.Y 0.46%	<input checked="" type="checkbox"/>	
	Raymond James Investment Services Ltd AJ Bell Investcentre SIPP	Growth 0.99%	Final Value £360,140.36	Total Fees £16,985.66	R.I.Y 0.51%	<input type="checkbox"/>	Select Platform
	James Hay Partnership Modular iSIPP	Growth 0.98%	Final Value £359,767.11	Total Fees £17,358.90	R.I.Y 0.52%	<input type="checkbox"/>	
	Elevate Elevate Pension Investment Account	Growth 0.98%	Final Value £359,709.43	Total Fees £17,416.58	R.I.Y 0.52%	<input type="checkbox"/>	
	Fidelity Adviser Solutions Fidelity Personal Pension	Growth 0.98%	Final Value £359,699.37	Total Fees £17,426.64	R.I.Y 0.52%	<input type="checkbox"/>	

Only one item can be selected. Confirm to change the selection:

Target Scheme

Investment

Switches/Trades

Fees

Family AUM

Target Scheme

Product: Comparison Basis

Term: 10Yrs 3Mos

Target Portfolio: Vanguard LifeStrategy 60% Equity A Shares Acc

Risk Category: Balanced

Outcome

Switch Result

Critical Yield: -0.85%

Hurdle Rate: -2.35%

Growth Rate (Mid): 1.50%

R.I.Y: 0.46%

[Report](#)

Select item

Only one item can be selected, choose an action to continue...

[Cancel](#) [Select this item](#)

Results

Comparison Report Update Results

Results						Comparison Report	Update Results
	Consolidated Cedding Schemes Projection of aggregated schemes for the purpose of comparison	Growth -1.32%	Final Value £291,987.12	Total Fees £97,834.77	R.I.Y 2.82%		
Stakeholder Pension						1 of 1 Results	
	Stakeholder Pension Basic Pension for Comparison Purposes	Growth 0.01%	Final Value £329,569.63	Total Fees £47,556.39	R.I.Y 1.49%		
Platforms						41 of 41 Results	
	P1 Investment Management The P1 SIPP	Growth 1.04%	Final Value £361,602.02	Total Fees £15,523.99	R.I.Y 0.46%	<input checked="" type="checkbox"/>	
	Raymond James Investment Services Ltd AJ Bell Investcentre SIPP	Growth 0.99%	Final Value £360,140.36	Total Fees £16,985.66	R.I.Y 0.51%	<input checked="" type="checkbox"/>	

Results					Comparison Report	Update Results
	Consolidated Cedding Schemes Projection of aggregated schemes for the purpose of comparison	Growth -1.32%	Final Value £291,987.12	Total Fees £97,834.77	R.I.Y 2.82%	
Stakeholder Pension					1 of 1 Results	
	Stakeholder Pension Basic Pension for Comparison Purposes	Growth 0.01%	Final Value £329,569.63	Total Fees £47,556.39	R.I.Y 1.49%	
Platforms					41 of 41 Results	
	P1 Investment Management The P1 SIPP	Growth 1.04%	Final Value £361,602.02	Total Fees £15,523.99	R.I.Y 0.46%	+
	Raymond James Investment Services Ltd AJ Bell Investcentre SIPP	Growth 0.99%	Final Value £360,140.36	Total Fees £16,985.66	R.I.Y 0.51%	✓

Switches/Trades and Fees can be added at the top of the screen:

Target Scheme

Investment

Switches/Trades

Fees

Family AUM

Target Scheme

Product

Comparison Basis

Target Portfolio

Vanguard LifeStrategy 60% Equity A Shares Acc

Term

10Yrs 3Mos

Risk Category

Balanced

For further information on Switch research, see article [Switching - Switches/Trades](#)