Switching - Switches/Trades

Last Modified on 18/10/2023 11:44 am BST

This article is a continuation of Switching - Results Screen

Add **Switches/Trades** under the Target Scheme at the top of the screen:

Target Scheme			
Investment			
Switches/Trades	Target Scheme		
Fees Switche	es/Trades t Comparison Basis	Term 10Yrs 3Mos	
Family AUM	Target Portfolio Vanguard LifeStrategy 60% Equity A Shares Acc	Risk Category Balanced	
	â		

Add the details and Update Results

Target Scheme		Outcome		
Investment Switches/Trades Fees Family AUM	+ Add Trades (Optional) Provide a number of trades, frequency and percentage of the value balance to trade. Trades (Buy / Sell) Trades (Buy / Sell) Frequency of Trades % of Balance to Trade 4 Quarterly To the second seco	Switch Result Critical Yield Hurdle Rate -0.81% -2.31% Growth Rate (Mid) R.I.Y 1.50% 0.51%		
Results		Comparison Report C ⁴ Update Results		
		val Value Total Pees R.I.Y 1,987.12 £97,834.77 2.82%		
Stakeholder Pension 1 of 1 Res				
		Nal Value Total Fees RLY 9,569,63 £47,556,39 1,49%		
V Platforms 41 of 41 Results				
PLATFOR		Nal Value Total Fees RUY 1,602.02 £15,523.99 0.46%		

The results will reflect the updated Switches/Trades.

For further information on Switch research, see article Switching - Fees