

Comparison & Ex-Ante - Research Report

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A Report can be created on the Research report:

The screenshot shows the Synaptic Research interface for a report titled "Susanna Comparison w/ Ex-ante". The interface is divided into several sections:

- Client Information:** Client: Susanna West, Description: Test Description Text, Illustration Type: Whole of Market, Segment Name, Policy Type.
- Navigation:** Research, Review, Client Check-in, Report. A "Mark Status as Complete" button is visible.
- Investments:** A sidebar with "Add Investment" and "Edit" buttons. It lists "Individual Savings Accounts" (Investment Amount: £22,620.00, Risk Category: Balanced (High End), Target Fund: Vanguard LifeStrategy 40% Equity A Shares Acc) and "Pensions" (Investment Amount: £239,691.57, Risk Category: Balanced (High End), Target Fund: Vanguard LifeStrategy 60% Equity A Shares Acc).
- Platforms Table:** A table with 37 of 37 results. Columns include Growth, Final Value, Total Fees, and RLY %. The table lists platforms like PLATFORM, JAMES HAY PARTNERSHIP, Fidelity Adviser Solutions, and Standard Life.
- Buttons:** "Report" (green), "Mark Status as Complete" (green), "Change Segment", "Stakeholder Pension", "Exclude Adviser Fees", "3 Significant Figures", "Filter Results by Provider", "Filter Results by Product", "Sort Results by Value", "Cancel", "Continue to Ex-ante Illustration".

You can either view the report or download:

The screenshot shows the Synaptic Platform Comparison Summary report. The report includes a header with the Synaptic logo and a "Download Report" button. The report is divided into several sections:

- Product Selection:** Selected Products: Individual Savings Accounts, Pensions.
- Individual Savings Accounts:** Summary of Investment, Contributions and Withdrawals. A table shows the following data:

Initial Investment	Transfer In	Contributions over the Period	Withdrawal over the Period	Total Invested Over the Period
£8,620.00	£0.00	£18,000.00	£1,000.00	£13,000.00

- Fund(s) Selected:** A table showing the following data:

Fund Name	Weighting %	Amount £
Vanguard LifeStrategy 40% Equity A Shares Acc	100%	£8,620.00

- Pensions:** Summary of Investment, Contributions and Withdrawals.

Download Report