

Comparison & Ex-Ante using a CIP - Research Report

Last Modified on 16/10/2023 12:40 pm BST

A Report can be created on the Research report:

Susanna Comparison w/Ex-ante CIP

Client: Susanna West | Description: Test Description | Illustration Type: Segment | Segment Name: Segment 1 | Policy Type: Segment 1

Investments: Pensions, Individual Savings Accounts

Platforms (11 of 11 Results):

Platform	Growth	Final Value	Total Fees	RLY %
AJ Bell (Investcentre)	3.76%	£376,474.32	£44,496.16	1.24%
transact1	3.76%	£376,426.17	£44,544.70	1.24%
transact1	3.76%	£376,426.17	£44,544.70	1.24%
7IM	3.75%	£376,126.08	£44,844.79	1.25%
7IM	3.74%	£375,750.55	£45,220.33	1.26%

You can either view the report or download:

Synaptic Platform Comparison Summary

Prepared For: Susanna West | Report Date: 16th October 2023 | Illustration Name: Susanna Comparison w/Ex-ante CIP

Product Selection: Pensions, Individual Savings Accounts

Individual Savings Accounts Summary:

Initial Investment	Transfer In	Contributions over the Period	Withdrawal over the Period	Total Invested Over the Period
£8,652.00	£10,000.00	£12,000.00	£1,000.00	£7,000.00

Fund(s) Selected:

Fund Name	Weighting %	Amount £
Vanguard LifeStrategy 20% Equity A-Gross Acc: GBP	37%	£6,801.24
Vanguard LifeStrategy 80% Equity A	63%	£11,750.76

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