Ranking contracts

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The filtering process above describes how to research a product type, and eliminate any contracts which do not meet a client's requirements. At the end of that stage the whole-of-market is reduced to those contracts which are capable of fulfilling the client's needs.

The next stage is to take the remaining contracts and rank them in order of preference. You click on the **Ranking** command above the grid of contracts, and the system displays the ranking screen illustrated by the first screenshot.

SYNAFTIC		Individual Savings Accounts			
Ranking		& Calculate % Back to filtering H			
Choose a group below, and then choose i or more fields to rank on Fund link stats	Each field you select on this list is tre description of it.	Each field you select on this list is treated as a separate ranking item. Click on an item's name for a Clear prove			
Pund link stats Desirable features	You only need to tick the items you w				
Past performance	Fund link stats	Importance Low Med High			
	Linked funds Linked sectors				
Calculars Clear of ranking	~				

This shows a list of different categories of ranking criteria down the left, and each item within a category on the right. You simply click on the category name to move from category to category. For a contract such as an investment bond, the categories include financial strength, past performance, projected surrender values (based on the contracts' charges), and desirable contract features.

You can pick up to 15 items to rank on (more if you use theMozilla Firefox browser). For each item you either do nothing – i.e. ignore it– or mark is as being of Low, Medium or High importance. The second screenshot illustrates a ranking scheme with a number of different items selected.

SYNAFTIC SUFFWARE	Individual Savings Accounts					
Ranking		S Calculate R Back to filtering Help				
Choose a group below, and then choose one or more fields to rank on Fund link stats	Fund link stats Each field you select on this list is the description of it.	Each field you select on this list is treated as a separate ranking item. Click on an item's name for a Clear group				
Desirable features	You only need to tick the items you want to rank on. Any items which you consider irrelevant can simply be left blank.					
Past performance	Fund link stats	Importance Low Med High				
	Linked funds					
	Linked sectors					
~						
Calculate Clear all ranking						

The third screenshot shows an example of a league table, with one tab for the total scores, and a separate tab showing the results for each individual ranking item which was selected. The ranking

results can be saved in PDF form for future reference.

S YPANTICE		Individual Savings Accounts	
Ranking results		SReport Save as PDF # Back to ranking # Back to filtering Help	
fotal score Desirability 📕 Lin	ked funds 📒 Linked sectors		
1 AXA Elevate	Elevate Stocks & Shares ISA - Explicit	30.0 pts	86%
2 Avalor Investment Services	Freedom ISAs	29.0 pts	83%
3 Seven Investment Management	ISA (Stocks and Shares)	25.0 pts	71%
2 Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares ISA Account	22.5 pts	64%
5 Standard Life Assurance Ltd	Wrap ISA	9.0 pts	26%

N.B. The sectors which are available as ranking items depend on the sectors which you filtered on in the previous stage. If you don't filter on any sectors, then you will not be able to rank on sector past performance.