# Filtering the grid of contracts

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The left-hand side of the grid screen shows all the fields of data which are recorded about the contracts, divided up into tabbed groups. (The fields and tabs which are available depend on the type of contract.)

STANAPTIC SOFTWARE		F	Personal Pension (Fully I Personal Pension (Fu	nsured)
Filtering (using preset criteria)	🖗 Ranking	# Report   # Quote   Comparison	1   Change title   Save as PDF   Delete   Copy   Send	Shared   Help
Features Sectors Conditions Stats F	-	20 contract	ts out of 25 (80%) - 0 manually excluded	Options
Flexible access drawdown facility Option to take full UPPLS	^	Сотрапу	Contract	
Option to take partial UFPLS		AEGON	One Retirement	
		Aviva Life & Pensions UK Limited	Personal Pension	<u>^</u>
Payment frequency options		AXA Life Invest (AXA Life Europe)	Secure Advantage+ Pension Plan	
Payment methods		AXA Wealth	Retirement Wealth Account (Adviser Charging)	
Pension premium insurance		Canada Life	CanRetire Pension Investment Plan	
	- 1	Cofunds Ltd	Cofunds Pension Account (provided by Suffolk Life)	
Guarantee options		FundsNetwork	FundsNetwork Personal Pension	
Accept minors		Legal & General	Portfolio Plus Pension	
		MetLife Services Ltd	The NetLife Retirement Portfolio (Secure Capital O	
Switching option		MetLife Services Ltd	The MetLife Retirement Portfolio (Secure Income C	
Automatic rebalancing		Old Mutual Wealth	Collective Retirement Account	
Lifestyle strategy		Old Mutual Wealth	CRA Wealth Select	
		Old Mutual Wealth	Personal Pension - Single Price	
Model portfolios		Prudential Intermediary Division	Pru Flexible Retirement Plan	
Death benefits		Royal London	Pension Portfolio	
	~	Sanlam	Portal Personal Pension	
Clear all fibers Audit trail		Scottish Widows	The Retirement Account - Initial Adviser Charging	
Import filter		Standard Life Assurance Ltd	active money personal pension	~

#### Features tab

The first, **Features** tab lists all the features offered by any of the contracts. Ticking the box next to a feature simply removes contracts which do not offer that feature. Ticking a second feature removes all the contracts which don't offer both features.

At the top of the grid, the caption tells you how many contracts meet all the conditions you're filtering on, and there's also a horizontal bar representing the percentage remaining.

SUNAPTIC SUPERATE				Individual Sa	vings Accounts
Filtering (using preset crite	eria)		🕫 Ranking   🕏 Report	Comparison   Change title   Save as PDF   Delete	Copy   Send   Not shared   Help
Features Sectors Conditions	Stats PP		scontract	ts out of 95 (0%) - 0 manually excluded	Options
Min age cash	>= 🗸	~			
Min age on Stocks and Shares	>= ¥	1	Company	Contract	
Maximum age at entry (nb)	3= <b>V</b>		AVA Elevate	Elevate Storius & Shares ISA - Evolutit	
Minimum monthly contribution (£)	>= 🖌 50	]	Novia	Novia Stocks & Shares ISA	
Minimum single contribution (£)	>= ¥	1	Nucleus	Nucleus ISA account	
Minimum single contribution per fund/trust (£)	>= V		Seven Investment Management	ESA (Stocks and Shares)	
Minimum monthly withdrawal (6)	>= ¥		Standard Life Assurance Ltd	Standard Life FundZone ISA	
Minimum annual withdrawal (E)	2= ¥	i	Standard Life Assurance Ltd	Wrap ISA Zurich Internedien: Stations - Cash 193 Account	
Minimum remaining balance (6)	5= W	i I	Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares If	
Minimum transfer value (£)	>= 🗸	i l			
Objective of ISA					
Deposit (cash facility) interest rate (%) paid to investor					
Basis of interest rate revision					
Frequency of interest rate revision	>= 🗸				
Dealing charge					
Partial withdrawal charge (£)		~			
Clear all filters Audit trail	Import filts	r			

**N.B.** You can also filter on data items by adding the item to the grid and then clicking on any of the values in the new column. This will generate a short list of filtering options, such as 'greater or equal to' or 'Less or equal to' etc.

Sectors tab

The **Sectors** tab shows all the sectors in which any of the contracts offers a linked fund – e.g. UK Equity, UK Fixed Income, money market, real estate . You simply tick all the sectors in which you want to invest the client's money, and the system removes contracts unless they offer a fund link in all the sectors you've asked for.

The **Sectors** tab also allows you to search for specific funds – i.e. to identify only those contracts through which a fund or basket of funds can be bought.

NOTE – the **Sectors** tab requires a sector definition choice to be made (between FE Global and IMA/ABI/AIC) before sectors can be chosen.

### Conditions tab

The **Conditions** tab shows policy conditions such as minimum age at entry, minimum investment, exit charges etc. You can filter on all numeric fields – for example, remove any contracts where the minimum age would prevent your client being able to take out the contract.

## Stats tab

The **Stats** tab contains financial strength fields, plus other information such as the number of linked funds, projected surrender values etc. These fields can be filtered in the same way as policy conditions. For example, the second screenshot shows how to eliminate all contracts whose AKG financial strength rating is worse than 4.

SDESWARE					Unit Lin
Filtering	# Ranking   # Report	PQuote   Comparison   Change tit	e   Save as PDF	Delete   Copy   Ser	nd   Not shared  )
Features Sectors Conditions Stats PP 🔳	-	5 contracts out of 20 (25%) - 0 m	anually excluded		Optio
AKG Unit Linked Business 🕴 🗦 👻 👍 🗸 AKG Unit Linked Business 😻 🗦 🐨 🖉 🔶	Company		Mnimum initial investment (£)	Minimum additional investment (£)	Minimum amount per policy (£)
Fund link statistics	AXA Wealth	Investment Bond (Adviser Charging)	£15,000	£1,000	£500
unkeo runos	Canada Life	CanInvest Select Account	£5,000	£1,000	£1,000
Linked sectors >= V	Standard Life Assurance	Onshore Bond (Wrep)	45,000	41,000	40
Surrender Values	Standard Life Assurance	Tailored Investment Bond	£15,000	\$2,500	£150
E10k Contribution after 1 year 🗁 🗸	Sterling Assurance	Sterling Investment Bond	£5,000	£3,000	£0
LIOK Contribution after 5 years (10k Contribution after 10 years >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>					

#### <u>PP tab</u>

The **PP** tab contains past performance data for all the sectors in which any contract has a fund link – you click on the name of each sector to view the fields inside it.

The third screenshot shows how to filter out any contracts which don't have a UK Equity fund with positive alpha (i.e. a better risk/reward profile than the sector average).

Filtering (using prese	t criteria)	# Ranking   # Report   Co	* Ranking   * Report   Comparison   Change title   Save as PDF   Delete   Copy   Send   Not shared   H			
Features Sectors Cond	itions Stats PP 🗮	14 contra	14 contracts out of 95 (15%) · 0 manually excluded			
8:Equity - Tech Media & Te Funds)	lecom (Offshore	Company	Contract	Offshore Funds:		
B:Equity - UK (Offshore Fu	nds)			UK - Alpha		
6 month	>= 🗸	Alliance Trust Savings Limited	Individual Savings Account (Inclusive Fee Option)	0.71		
9 month	>= 🗸	Alliance Trust Savings Limited	Individual Savings Account (Standard Fee Option)	0.71		
1 year	>= ¥	Ascentric	Ascentric Stocks & Shares ISA	1.08		
vear		Avalon Investment Services	Freedom ISAs	1.08		
usar.		AXA Elevate	Elevate Stocks & Shares ISA - Explicit	1.08		
Year		James Hay Partnership	James Hay Wrap ISA	1.08		
+ year	2	James Hay Partnership	Modular Stocks & Shares ISA	1.08		
5 year	>= ♥	Novia	Novia Stocks & Shares ISA	1.08		
5 year	>= 🗸	Nucleus	Nucleus ISA account	1.08		
year	>= 🗸	Platform One Limited	IFDL ISA	0.86		
year	24 V	Standard Life Assurance Ltd	Wrap ISA	0.52		
vear		Transact	Transact Wrap ISA	1.08		
0 year		Zurich Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account	1.08		
untile consistency		Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares It	1.08		
Quartile consistency						

**NOTE** – the **PP** tab requires a sector definition choice to be made (between FE Global and IMA/ABI/AIC) before filtering can be done on past performance data (unless the choice has already been made on the Sectors tab).