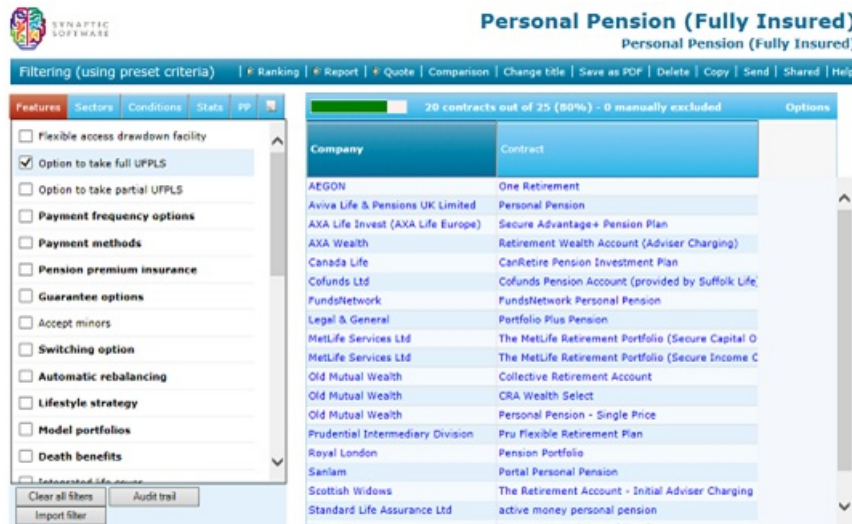


Filtering the grid of contracts

Last Modified on 10/01/2024 12:36 pm GMT

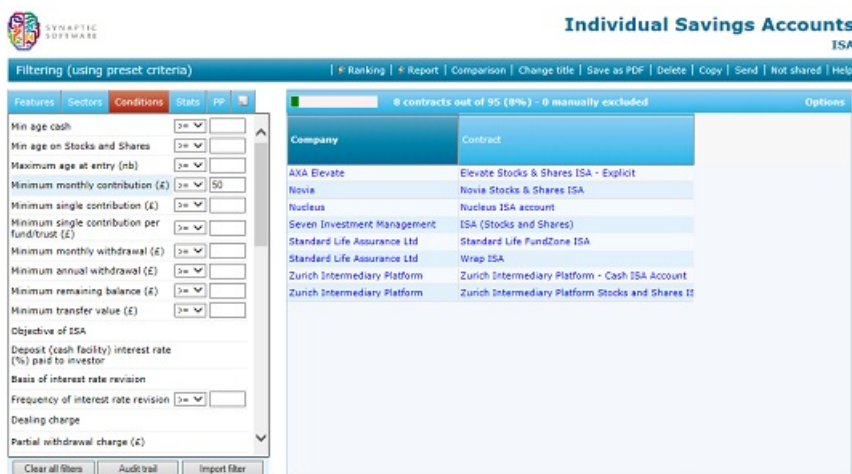
The left-hand side of the grid screen shows all the fields of data which are recorded about the contracts, divided up into tabbed groups. (The fields and tabs which are available depend on the type of contract.)



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.



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.

The screenshot shows the 'Investment Bond Unit Linked' software interface. On the left, there is a 'Filtering' sidebar with various filter options like 'AKG Unit Linked Business', 'Moody's rating', 'Fund link statistics', 'Linked funds', 'Linked sectors', and 'Surrender Values'. The main area displays a table with 5 contracts out of 20 (25%) - 0 manually excluded. The table has the following data:

Company	Contract	Minimum initial investment (£)	Minimum additional investment (£)	Minimum amount per policy (£)
AXA Wealth	Investment Bond (Adviser Charging)	£15,000	£1,000	£500
Canada Life	CanInvest Select Account	£5,000	£1,000	£1,000
Standard Life Assurance	Standard Life Assurance (Onshore Bond (Strap))	£5,000	£1,000	£0
Standard Life Assurance	Standard Life Assurance Tailored Investment Bond	£15,000	£2,500	£150
Sterling Assurance	Sterling Investment Bond	£5,000	£1,000	£0

PP tab

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).



Individual Savings Accounts

ISA

Filtering (using preset criteria)

Ranking | Report | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

14 contracts out of 95 (15%) - 0 manually excluded

Company	Contract	Offshore Funds: Bi:Equity - UK - Alpha
Alliance Trust Savings Limited	Individual Savings Account (Inclusive Fee Option)	0.71
Alliance Trust Savings Limited	Individual Savings Account (Standard Fee Option)	0.71
Ascentric	Ascentric Stocks & Shares ISA	1.08
Avalon Investment Services	Freedom ISAs	1.08
AXA Elevate	Elevate Stocks & Shares ISA - Explicit	1.08
James Hay Partnership	James Hay Wrap ISA	1.08
James Hay Partnership	Modular Stocks & Shares ISA	1.08
Novia	Novia Stocks & Shares ISA	1.08
Nucleus	Nucleus ISA account	1.08
Platform One Limited	IFDL ISA	0.86
Standard Life Assurance Ltd	Wrap ISA	0.52
Transact	Transact Wrap ISA	1.08
Zurich Intermediary Platform	Zurich Intermediary Platform - Cash ISA Account	1.08
Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares I!	1.08

Options

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).