Grid of contracts

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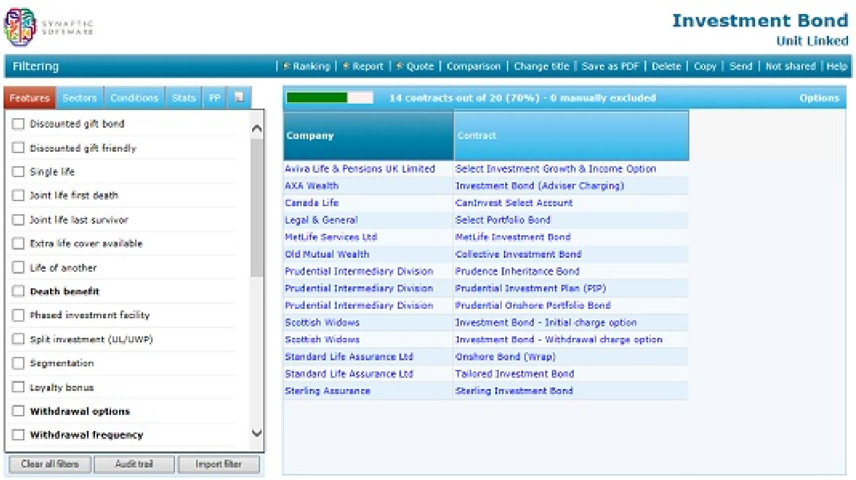
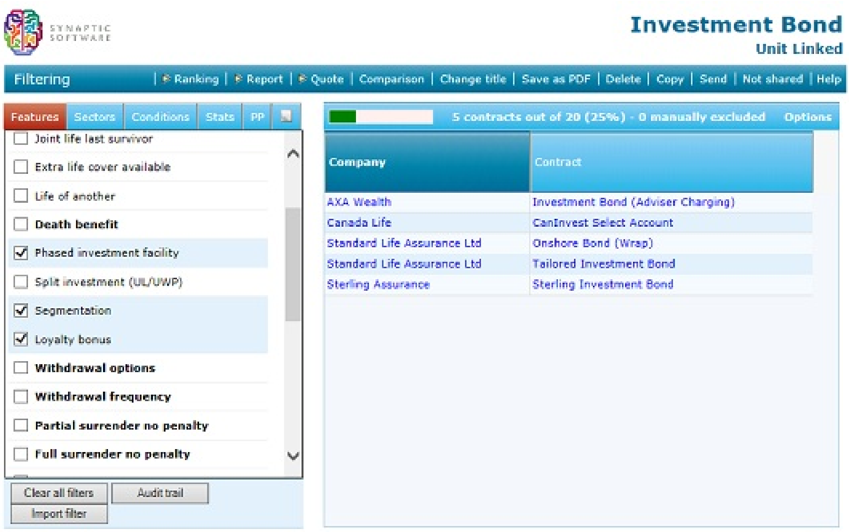
This screen is the heart of Synaptic Research. On the right-hand side it starts by showing all the contracts for the type of product being researched. On the left it shows all the fields of data which Synaptic collects about those contracts, divided up into tabbed groups.

The first screenshot shows a list of all unit-linked investment bonds, and the five tabbed categories of field which Synaptic collects about bonds.



For financial advisers, the main purpose of this screen is to filter out contracts which do not meet the client’s requirements – e.g. contracts which don’t offer essential features, or whose charges are uncompetitive, or which cannot implement the portfolio needed for the client’s asset allocation requirements, or whose past performance is poor. The second screenshot shows filtering on investment bonds which offer phased investment, segmentation, and a loyalty bonus.



Filtering is a powerful area of the software, and is covered in the next article. However, the grid of contracts can also be used for a number of other purposes. Each of these is discussed briefly in this Getting Started section, and in full detail in the User Guide.

For example:

- Adding columns to the grid of contracts
- View contract factsheets and lists of linked funds
- Manually selecting the contracts to research