

# 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.

The screenshot shows the Synaptic Software interface for 'Investment Bond Unit Linked'. The top navigation bar includes 'Filtering', 'Ranking', 'Report', 'Quote', 'Comparison', 'Change title', 'Save as PDF', 'Delete', 'Copy', 'Send', 'Not shared', and 'Help'. The left sidebar has tabs for 'Features', 'Sectors', 'Conditions', 'Stats', and 'PP'. Under 'Features', several checkboxes are visible, including 'Discounted gift bond', 'Single life', 'Joint life first death', 'Joint life last survivor', 'Extra life cover available', 'Life of another', 'Death benefit', 'Phased investment facility', 'Split investment (UL/UWP)', 'Segmentation', 'Loyalty bonus', 'Withdrawal options', and 'Withdrawal frequency'. The main table displays 14 contracts with columns for 'Company' and 'Contract'. The table data is as follows:

Company	Contract
Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option
AXA Wealth	Investment Bond (Adviser Charging)
Canada Life	CanInvest Select Account
Legal & General	Select Portfolio Bond
MetLife Services Ltd	MetLife Investment Bond
Old Mutual Wealth	Collective Investment Bond
Prudential Intermediary Division	Prudence Inheritance Bond
Prudential Intermediary Division	Prudential Investment Plan (PIP)
Prudential Intermediary Division	Prudential Onshore Portfolio Bond
Scottish Widows	Investment Bond - Initial charge option
Scottish Widows	Investment Bond - Withdrawal charge option
Standard Life Assurance Ltd	Onshore Bond (Wrap)
Standard Life Assurance Ltd	Tailored Investment Bond
Sterling Assurance	Sterling Investment Bond

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.

The screenshot shows the Synaptic Software interface for 'Investment Bond Unit Linked' with filters applied. The top navigation bar is the same as the first screenshot. The left sidebar shows the 'Features' tab selected, with the following filters applied: 'Phased investment facility', 'Segmentation', and 'Loyalty bonus'. The main table displays 5 contracts with columns for 'Company' and 'Contract'. The table data is as follows:

Company	Contract
AXA Wealth	Investment Bond (Adviser Charging)
Canada Life	CanInvest Select Account
Standard Life Assurance Ltd	Onshore Bond (Wrap)
Standard Life Assurance Ltd	Tailored Investment Bond
Sterling Assurance	Sterling Investment Bond

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
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