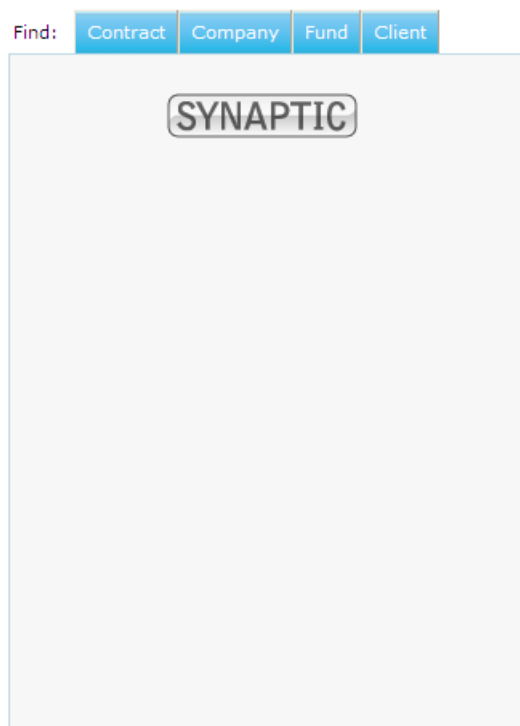


# How do I search for fund factsheets?

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

This article explains how fact sheets can be produced from Synaptic Research for **Contracts**, **Companies** and **Funds**.

Within Synaptic Research there is the ability to produce fact sheets for current **Contracts**, for **Companies** who are present on the software and also for over 95,000 funds (March 2011). Use this section on the **Home page** to get access to these fact sheets:

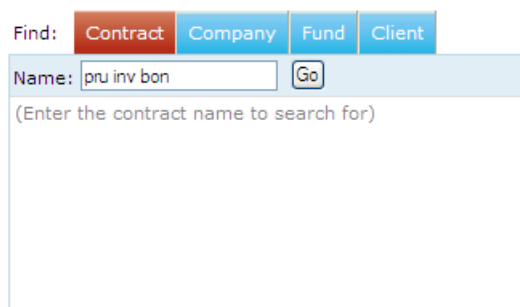


Use the tabs - **Contracts**, **Company**, **Fund** to get access to the relevant fact sheet.

In this example, we are going to access a fact sheet for the **Prudential Investment Bond**.

Select **Contracts** and type in the name of the contract. The full name can be entered, or a string search can be entered.

A string search is a shortened version of the contract name:



Once this has been entered, click **Go**. Select the contract to produce the fact sheet, by clicking on the blue contract name:

Find: **Contract** Company Fund Client

Name:

- Prudential Intermediary Division Flexible Investment Plan - Distribution Income Bond (ICO)  
Investment Bond, Distribution
- Prudential Intermediary Division Flexible Investment Plan - Distribution Income Bond (NICO)  
Investment Bond, Distribution
- Prudential Intermediary Division Flexible Investment Plan - Managed Bond (IC)  
Investment Bond, Protected Benefits
- Prudential Intermediary Division Flexible Investment Plan - Managed Bond (IC)  
Investment Bond, Unit Linked
- Prudential Intermediary Division Flexible Investment Plan - Managed Bond (NIC)  
Investment Bond, Protected Benefits
- Prudential Intermediary Division Flexible Investment Plan - Managed Bond (NIC)  
Investment Bond, Unit Linked
- Prudential Intermediary Division Flexible Investment Plan - Prudence Bond - (IC)  
Investment Bond, Unitised With Profit

Once this has been done, the fact sheet will be displayed:

**Prudential Assurance Company**  
Prudential Investment Plan (PIP)

Contract details | Save as PDF | Linked funds | Research this product type | Help

Choose the information to display:  Features  Conditions  Financial strength  Stats  Notes

Sectors  Linked funds  
FE Global Sectors  FE Global Sectors  IMA/ABI/AIC Sectors

**Contract summary**

Contract name: Prudential Investment Plan (PIP)  
Provider: Prudential Assurance Company  
Product type: Investment Bond, Unitised With Profit

**Contract features** (Items marked with \* are clarified by policy conditions)

Single life	Yes	Unlimited no of telephone valuations	Yes*
Joint life first death	No	Illustrations	Yes
Joint life last survivor	Yes	Asset driven growth rates	Yes
Extra life cover available	No	Asset driven growth rates vary with term	No
Life of another	Yes	Adviser own growth rates	No
Death benefit	Yes*	Fund specific charges	Yes
Greater than bid value	Yes*	Adviser charges supported	Yes
Original investment (minus withdrawals) if greater than bid value	Yes*	Initial fixed amount	Yes
Segmentation	Yes	Regular premium fixed amount	No
Loyalty bonus	No	Fund based fixed amount	Yes
Withdrawal options	Yes	Initial percentage	Yes
Penalty free withdrawal allowance	Yes*	Regular premium percentage	No
Withdrawal frequency	Yes	Fund based percentage	Yes
Monthly	Yes	No additional fee	No
Quarterly	Yes	Reviewed monthly	No
Termly income	Yes	Reviewed quarterly	No
Half yearly	Yes	Reviewed half yearly	No
Annually	Yes	Reviewed annually	No
Partial surrender no penalty	Yes*	Reviewed other frequency	No
At any time	Yes*	Outcome of reviews communicated to customers	No
Full surrender no penalty	Yes*	Option to customise portfolio	No
At any time	Yes*	Special offer	No
All switches free	Yes*	Ethical funds	No
Partial switch allowed	Yes*	FoF funds	No
One free switch allowed	Yes*	MoM funds	No
Share exchange facility	No		

At the top of the fact sheet is a **Menu Bar** and on this there is a button to **Save as PDF**. This needs to be used to print out the fact sheet. Do not use the printer icon on the webpage **Menu Bar**.

To amend what is viewable/printable from a fact sheet, use this section:

Choose the information to display

Features  Conditions  Financial strength  Stats  Notes

Sectors  Linked funds

FE Global Sectors  FE Global Sectors  IMA/ABI/AIC Sectors

Click into the boxes at the beginning of the sections to either select or deselect.

The same method can be used for any of the factsheets.

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