Are there any tips when using fund research?

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Synaptic Research obviously responds faster if there are fewer funds which it needs to display in the grid. Therefore, wherever possible, it's best to set up filtering, using the **Features** and **Stats** tabs, **before** you add funds to the grid using the **Sectors** tab. Let's say that you are going to research all unit trusts in the UK All Companies sector, and you are only interested in funds with positive alpha, whose average quartile ranking is 2.5 or better, and which have been around for at least five years.It's more efficient to set up this filtering first (using the Stats tab as illustrated by the screenshot below) and then add the sectors using the Sectors tab, rather than selecting the sectors first and then filtering the grid down.

Filtering			Ranki	ng F Report Change title Availability S					
Features Sectors Conditions	Stats	1997	_	Showing 1 to 1 of 1	fund		tsheets	Graph	Option
Quartile ranking 1 year	>= ¥		~	Fund		Quartiles: Avp.	Fund details:	Investment Trust: UK	
Quartile ranking 3 years	$> \vee$			rund	metrica: Alpha	quartile rank	Years of data	All Companies	
Quartile ranking 5 years	>• 🗸			Crystal Amber	1.62	3	7	Yes	
Quartile ranking 10 years	>= 🗸								
Quartile consistency	>= 🗸								
kvg. quartile rank	>= ¥	2.5							
tisk metrics									
/olability	>= 🗸								
lipha	>= ¥	D.01							
leta	>= ¥								
Sector correlation	>= 🗸								
information ratio	>= 🗸								
Sharpe ratio	>= ¥		1						
Sortino ratio	>* ¥								
Sector covariance	>= ¥								
Cash covariance	>= 🗸								
Kurtosis	>= ¥		V						

Fund features

The Features tab of fund research includes a number of items which are quick ways of filtering out funds based on minimum performance requirement. The Top Crown rating field eliminates contracts unless they are top-ranked (i.e. 5 Crowns) by FE; the quartile features eliminate funds unless they have been top-quartile performers over the chosen period. All of these are simply quick ways of imposing conditions which can also be set via the Stats tab. The first screenshot below shows filtering on the features for the FE Crown rating, and on quartile ranking over 3 years.

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Tenaria Sectors Conditions South R	Showing 1 to 10 of 11 hands		Faction	010	Options					
34 Mixed Development Chr-Strin Shanes (and Youd)	2 mil	perfect to 1				See Treed at				
34 Rived December of 20% 40% Dates (Unit Trust)		1000				companies				
34 Mixed Investment 40%-85% Shares (unit Trust)	Replace UK Hal Cap J. Soc Did Matael UK Hal Cap A Acc	26.23	1.4	174.55	54 54	794				
	Barclave UK Lower Cap A Acc	16.73	1.5	18.5	80	700				
34 Romo Rafet (Unit Trail)	HTH Caller Crewith	16.12	1.4	233.27		Ves				
34 North Interna (Unit Trust)	FBC UK Rid Cap 1 Acc	13.48	1.1	29.87	84	784				
34. North American Smaller Companies (Unit: Truet)	Aberdeen Property Share A Acc	15.52	1.5	400.4	794	80				
3 Personal Panelone (prit Yuef)	Daniard Life Investments UK Equity Uncertainting	14.56	1.0	1287	64	Visa.				
	Edentries UK Boarty Brandh A	04.88	1.8	183.31	84	786				
Z 34 Property (Unit Treat)	Threadneedle UK Wid 250 Rat Acc	54.02	1.5	120.25	80	798				
3 A Protected Early Truet	Premier Pan European Property & Inc.	14.13	1.8	526.47	Ves	As.				
a shot two Morey Market (Unit truet)	Pranktie UK Ramagens Pocce A Ass	13.79	1.8	134.58	80	788				
34 Specialist (Unit Trust)	Covendati docortunities A Listinus Granial Studions 8 Inc.	13.50	1.5	130.37	80	100				
	Premier Ethical A Inc	12.99	1.8	101.61		784				
34 Starling Corporate Bond (Sinit Trust)	Supher UK Growth for	12.77	1.5	15:00.00	80	784				
34. Barling High Yand (Juni Yuni)	Renderson UK Equity Income & Granth & Inc.	12.55	1.8	551.51		Van.				
24 Devices Destroys Band (Unit Toyal)	Edwader UK Rid 200 A Ris	12.5	1.1	1287	Re.	786				
	Majedie UK Poque A	12.25	2	428	80	790				
34 Targeted Absolute Return (Unit: Truet)	Harlberough UK Hulti Cap Growth A Dre	13.14	1.5	91.21	No.	Ves.				
34. Technology & Telecone (Brid Trust)	Danded Life Investments UK Divisit Rel	12.14	1.0	240.8	Av.	788				
Z 34 UK dil Companies (Unit Trust)	Renderson Okibel Care VR Snoome A Snc	12.09	1.5	129.8	80	798				
	SVM UK Growth A	13.06	1.8	126.83	60	100				
34 UK Bouts & Band Broome (Unit Yout)	BLR Revers UK Dynamic Rel	11.80	1.8	10	Re.	788				
34 UK Bauly Store (248 Yeal)	Stylesco Pergetuel High Scotte Enc. Inveses Pergetuel Institut Ins	11.09	1.67	11123.38	50	790				
34 UK Dills (Set Trail)	Investo Perpensional UK Pasus Ras	11.67	1.67	230.82	-	785				
In the trades - Cinital Gifts (Unit Your)	Streated UK Alghe # Acc 08F	11.50	1.5	404.87		794				
	Southab Waless HS785, UK Strategie 1	11.54	1.5	26.74	80	Van.				
34 UK Briefer Companies (Unit Truet)	Investor Pergelual UK Granith Into	11.04	1.88	1131.12	84	Yes.				
34 Undeselfed (Unit Trust)	REM OR BUILTY Unconstrained #	11.08	1.73	7.88	80	794				
I net set assigned (unit front)	Service Granth & Are	55.58	1.5	26	81	100				
	Britemia UK Growth & Ass	11.38	1.0	472.17	Ar	Yes.				
Clear all seriors	History and Mid-Cap.A	11.09	1.0	\$2.97	80	798				
Cine al Mara. Judi Iral IrqueViller	Kenes Othical Equity & Are	55.26	1.5	596-87	84	100				

The second screenshot shows the equivalent filtering on the Stats

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SYNAPTIC SOFTWARE							Fun	d data
Filtering	6	Rankin	g R Report Change title Availability Save a	s PDF Delete	Copy Send	Not shared	Convert to n	anual Hel
Features Sectors Condit	iona Stata 🔳		Showing 1 to 11 of 11 fun	Factsheets		Graph	Options	
AP 6 years AP 7 years	>= ¥ >= ¥	^	Fund	Risk metrics; Alpha	Quartiles: Avg. quartile rank	Fund details: Years of data	Investment Trust: UK Al Compenies	Financial Express rating: Crown
AP 8 years	>= 🗸		Aberdeen UK Tracker Trust Pic Ord 10P	-0.5	2.6	10	Yes	
AP 9 years	>= 🗸		Artemis Alpha Trust plc	-0.55	2.7	10	Yes	1
AP 10 years	>= ¥		Aurora Investment Trust plc	-0.23	3	10	Yes	. 1
Annual Quartiles			Capital Gearing Trust plc	-0.32	2.8	10	Yes	1
Quartile Yr 1			Invesco Perpetual Select UK Equity plc	0.56	1.0		Yes	
Quartile Yr 2			JP Norgan Mid Cap IT plc	1.2	2.4	10	Yes	5
Quartile Yr 3	>= ¥ 2		Keystone IT Pic	0.28	2.1	10	Yes	-
Quartile Yr 4	>= ¥		Hanchester & London IT plc	-1.55	3.2	10	Yes	
Quartile Yr S	>= ¥		Schroder UK Growth plc The Mercantile Investment Trust Plc	-0.99	2.4	10	Yes	-
	>= ♥		The Mercantile Investment Trust Pic Threadneedle UK Select Trust	0.22	2.2	10	Yes	-
Best/worst			Inreadneedle UK select Trust	-0.04	2.3	10	tes	
Best 12-months	>= 🗸							
Worst 12-months	>• 🗸							
Gain years	>* ¥							
Loss years	>= ¥							
Charges		~						

The fields on the Stats tab are obviously more flexible – for example, you can say that you want a quartile ranking of 2 or better, rather than just top-quartile performers. The fields on the Features tab are simply intended for convenience and speed. Finding funds within a grid.

If you are looking at a grid which contains lots of funds (e.g. hundreds of funds) and you want to find a specific fund within the grid, you can simply use the find functionality built into your web browser. Simply press **Ctrl**+**F**.