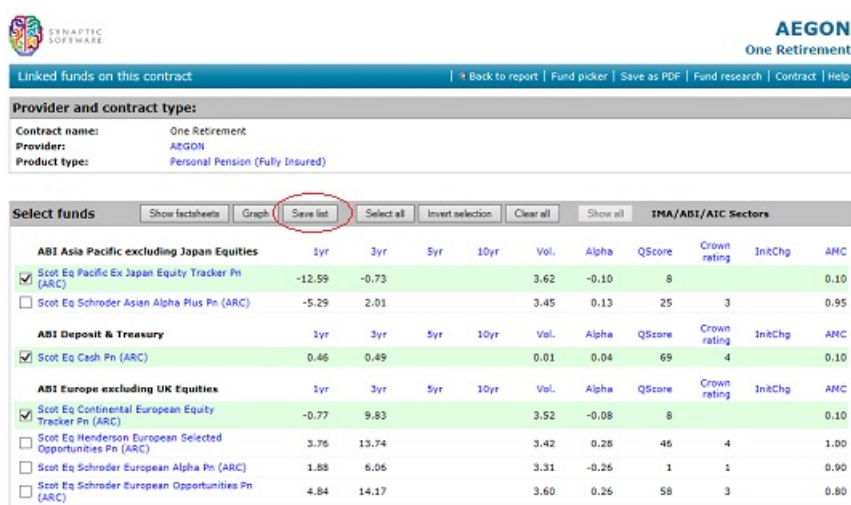


# How do I save results from the fund picker and include it in reports?

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

The results of the Fund Picker – i.e. your chosen selection of funds – must be saved using the **Save list** button which is highlighted in the screenshot below. The list of selected funds is then included in any suitability reports which you generate, providing documentation of the funds you are recommending.



The screenshot displays the AEGON One Retirement fund picker interface. At the top, there are navigation links: "Back to report", "Fund picker", "Save as PDF", "Fund research", "Contract", and "Help". Below this, the "Provider and contract type" section shows: "Contract name: One Retirement", "Provider: AEGON", and "Product type: Personal Pension (Fully Insured)".

The "Select funds" section features a table with columns for performance metrics (1yr, 3yr, 5yr, 10yr, Vol., Alpha, QScore, Crown rating, InChg, ANC) and a "Save list" button circled in red. The table lists several funds, including "ABI Asia Pacific excluding Japan Equities", "ABI Deposit & Treasury", and "ABI Europe excluding UK Equities".

	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	InChg	ANC
<b>ABI Asia Pacific excluding Japan Equities</b>										
<input checked="" type="checkbox"/> Scot Eq Pacific Ex Japan Equity Tracker Pn (ARC)	-12.59	-0.73			3.62	-0.10	8			0.10
<input type="checkbox"/> Scot Eq Schroder Asian Alpha Plus Pn (ARC)	-5.29	2.01			3.45	0.13	25	3		0.95
<b>ABI Deposit &amp; Treasury</b>										
<input checked="" type="checkbox"/> Scot Eq Cash Pn (ARC)	0.46	0.49			0.01	0.04	69	4		0.10
<b>ABI Europe excluding UK Equities</b>										
<input checked="" type="checkbox"/> Scot Eq Continental European Equity Tracker Pn (ARC)	-0.77	9.83			3.52	-0.08	8			0.10
<input type="checkbox"/> Scot Eq Henderson European Selected Opportunities Pn (ARC)	3.76	13.74			3.42	0.28	46	4		1.00
<input type="checkbox"/> Scot Eq Schroder European Alpha Pn (ARC)	1.88	6.06			3.31	-0.26	1	1		0.90
<input type="checkbox"/> Scot Eq Schroder European Opportunities Pn (ARC)	4.84	14.17			3.60	0.26	58	3		0.80

This **Save list** button is displayed **only** under the following conditions: You are looking at the list of linked funds in the context of a piece of research. (In other words, it is not displayed if you open a contract factsheet from the home page, and then view the linked funds on the contract.) The contract in question has already been marked as the selected contract for the piece of research.

For example, the [Fund picker](#) button is displayed if you use the Fund picker from the report selection screen, when you have selected a contract. This link is highlighted in the screenshot below.

**SYNAPTIC SOFTWARE** **Investment Bond**  
Unit Linked

Choose a report template | [Fund picker](#) | [Back to ranking](#) | [Back to filtering](#) | [Quote](#) | [Help](#)

**1. Choose the contract you are recommending (if any)**

-	(No recommendation)	-
1	Legal & General Select Portfolio Bond	73.3 pts
2	Prudential Intermediary Division Prudential Investment Plan (PIP)	65.1 pts
3	Canada Life CanInvest Select Account	52.5 pts
4	Old Mutual Wealth Collective Investment Bond	50.2 pts
5	Aviva Life & Pensions UK Limited Select Investment Growth & Income Option	49.4 pts
6	AXA Wealth Investment Bond (Adviser Charging)	46.7 pts
7	Sterling Assurance Sterling Investment Bond	44.3 pts

**2. Click on a report template**

<input type="checkbox"/> Quick reports (open in your browser)	<input checked="" type="checkbox"/> Report Manager suitability reports (download as RTF)
<a href="#">Standard research report</a>	<a href="#">Research Report</a>
<a href="#">Factsheet for the selected contract</a>	<a href="#">Standard Report - Investment Bonds</a>