How do I use Manual fund lists?

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As described above, a manual fund list is simply an ad hoc list of funds chosen by you, rather than a list of funds which have something in common – such as unit trusts in the same sector, funds linked to a specific contract etc.

You add funds to a manual list using the **add a fund** link at the top of the filtering grid. This is highlighted in the screenshot below:

| Features Sectors Conditions Stats 🗮 | | Showing 1 to 6 of 6 fund | add a fund |) [8 | actaheeta | Graph | Options |
|-------------------------------------|-----|--|-------------------------------|--------------------------------|-----------|-----------------------------------|---------------------------------|
| Primary fund Open fund | ~ | Fund | Arnual perf.: AP 1 year | Annual perf.: AP 5 years | | Best/worst: Best 12- months | Best/worst Worst 12 month |
| Ethical fund | | 9 AXA Euro 7-10 D | -3.07 | 2.91 | | 38.09 | -8.5 |
| | | O Franklin Nutual Global Discovery W Acc EUR | -6.15 | 5.11 | | 31.79 | -10.4 |
| CAT standard | | O Invesco Active Managed Pn 7 | 6.26 | 11.26 | | 46.58 | -29.1 |
| Top Crown rating | | O Invesco Active Hulti-Sector Credit A EUR | -5.2 | -2.42 | 1.51 | 30.41 | -9.5 |
| Top quartile 1 year | | O Invesco Perpetual High Income Acc | 7.25 | 11.85 | | 31.95 | -25.7 |
| Top quartile 3 years | | O Zurich 7IN AAP Adventurous EP | -1.72 | 5.53 | | 27.15 | -11.0 |
| Top quartile 5 years | | | | | | | |
| Top quartile 10 years | | | | | | | |
| Income fund | | | | | | | |
| Accumulation fund | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | 1.1 | | | | | | |

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Funds can be removed from the list by clicking on the grey cross next to their name.

Manual fund lists can be used to record a client's currentor intended portfolio, or any ad hoc list of funds which you want to compare. Manual fund lists can even just be used as a list of "favourites" – a quick way of printing out factsheets for funds which you use regularly. (You create a manual fund list to hold the funds, and then use the Factsheets button to generate factsheets for all the funds at once.)

It's worth remembering that manual fund lists are automatically saved (like all other research in Synaptic Research), and that you can change the title of the research. Therefore, you can give your manual fund lists more memorable names such as "Bob's ISA portfolio" or "Special Situations funds".

Filtering manual fund lists

Manual fund lists can be filtered just like any other piece of research. For example, you can add 5 funds to the grid, and then use filtering to see which of them have been top-quartile performers, or have positive alpha etc.

Converting other fund research into a manual list

All other types of fund research can be converted into a manual fund list. You simply click on the Convert To manual link in the research's menu bar. This is highlighted in the screenshot below:

| Filtering | 🕏 Ranki | ng * Report Change title Availability Save as | PDF Delete Coj | py Send Not : | shared Conver | t to manual |
|--|---------|--|-----------------------|-------------------|-----------------|-------------|
| eatures Sectors Conditions Stats 📕 | | Showing 1 to 500 of 1570 fr | | Factsheets | Graph | Options |
| Primary fund | ~ | | [1] 2 3 4 | | | |
| Open fund | | Fund | Annual perf.: AP 5 | | | |
| Ethical fund | | | years | | | |
| CAT standard | | PL Old Mutual UK Nid Cap EP | 18.08 | | | |
| | | AXA Wealth Old Mutual UK Mid Cap Pn S4 | 17.56 | | | |
| Top Crown rating | | Pru Old Mutual UK Nid Cap Pn Ser A | 17,41 | | | |
| Top quartile 1 year | | L&G Old Nutual UK Mid Cap Pn G25 L637 | 17.25 | | | |
| Top quartile 3 years | | Stan Life Old Mtl UK Mid Cap Pn S3 | 17.21 | | | |
| | | OMW Old Mutual UK Mid Cap Pn | 17.14 | | | |
| Top quartile 5 years | | ONW Old Nutual Equity 1 Pn | 17.13 | | | |
| Top quartile 10 years | | Aviva Old Nutual UK Mid Cap Pn 55 | 17.08 | | | |
| Income fund | | Zurich Old Mutual UK Mid Cap ZP Stan Life UK Equity Unconstrained Pn S5 | 17.06 | | | |
| Income rung | | NFU Mutual Property Pn S1 | 16.63 | | | |
| Accumulation fund | | NFO Notual Property Ph S1 NFU Nutual PPA Property Ph S3 | 16.2 | | | |
| | | NFU Mutual Stakeholder Property Pn S1 | 16.2 | | | |
| | | NFU Mutual Trustee Investment Plan Property Pn S | | | | |
| | | MetLife Benchmark Aberdeen Property Share Pri G | | | | |
| | ~ | Stan Life SLI UK Equity Unconstrained Pn S2 | 15.76 | | | |
| 1 | | Stan Life Aberdeen Property Share Pn S3 | 15.26 | | | |
| Clear all Siters Audit trail Import fi | ter | Lac sharden Property share in 55 | 10.00 | | | |

The research then stops being a dynamic list of funds and becomes a fixed one. For example, let's say that you start off by researching a list of all the unit trusts in the Equity UK sector. When a new Equity UK unit trust is released in future, it will automatically be added to your research. However, if you convert the research into a manual fund list then it becomes fixed, and is no longer affected by what the funds originally had in common (i.e. being unit trusts in the Equity UK sector). If new Equity UK unit trusts are released in future, they will not appear on the manual list.

Adding funds to a manual list from other research

It's also possible to add funds into a manual list while carrying out another type of fund research. For example, you can do research into unit trusts, and add selected funds from the list of unit trusts into a manual fund list.

First, you create the manual list which you want to add funds into. Next, while looking at other fund research such as all unit trusts in the Equity UK sector, you click the right mouse button over a fund name and choose the **Add To manual list** option.

Choose a list to add this fund to

Balanced Manual Balanced Portfolio Manual fund Cautious1510 Manual fund list1307 Fund data: Manual fund list Fund data: Manual fund list Manual Ethical Manual fund list (conversion) Manual fund list (conversion) Manual fund list (conversion) Manual fund list14092015 Manual fund list Manual Generic 1409 Test Manual23 Test1Manual

This displays the pop-up window illustrated by the screenshot above, asking you which manual list to add the fund to. Note that any Manual Fund List where you haven't changed the title will be

shown simply as "Manual Fund List", which makes it very difficult to determine the content.