Can I manually exclude contracts?

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

As well as (or instead of) filtering the grid of contracts, you can also manually select which contracts to include. This is particularly useful for comparing a specific set of contracts rather than the whole of market – e.g. product provider competitor analysis, multi-tie research etc.

N.B. Manual exclusion only applies to product research. It is not available on fund research.

You can specify the contracts to include/exclude in either of two ways:

Excluding individual contracts

You can remove an individual contract by clicking the right mouse button over the contract name in the grid, and choosing Exclude contract. This displays the pop-up window illustrated by the first screenshot.

Reason for excluding the contract (optional):	
Not included on Head office approved list.	~
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Optionally, you can enter text describing why the contract is being excluded. This reason is then included in any suitability reports or Quick Reports which you generate.

Excluding multiple contracts at once

You can exclude several contracts at once by clicking on the link at the top of the grid where it says "0 manually excluded". This is highlighted in the screenshot below.

Features Sectors Conditions State	89			-	All 20 central (0 manually exclus	1			Option
Ninimum age at entry (ND) policy holder	34 ¥		~	Second and the second se	and the second	Extra life		Maximum age at entry (NII) policy	
Ninimum age at entry (NS) life assured	34.4		iii.	Company		cover eveniable	Linked	entry (NR) policy holder	
Haximum age at entry (NB) policy holder	>= ¥		1	Avtes Life & Pensions L	Select Investment Growth & Income	No	5	None	
Naximum age at entry (ND) life assured	N.V			AXA Wealth	Investment Bond (Adviser Charging)	No	5	None	
Ninimum initial investment (2)		100000		Canada Life	CanTrivest Select Account	No	4	None	
Nivimum additional investment (4)	3× ¥			HSBC Life (UK) Ltd	HSBC Orshore Investment Bond (Se	No	3 ort	None	
Hinimum amount per policy (2)	2. 4	_		Legal & General	Select Portfolio Bond	Yes	5	99	
and a description of the state of the	2.4 4			MetLife Services Ltd	MetLife Investment Bond	140	4	90	
Hax number policies per bond	2. 4			Nucleus	Nucleus Onshore Bond	No		None	
initial/establishment charge					Collective Investment Bond	Yes	5	85	
Additional bond charges			-		Prudence Inheritance Cond	No	5	90	
Exit charge year 5 (%)	3+ ¥				Prodential Investment Plan (PIP)	No	5	None	
Exit charge year 2 (%)	[= ¥]	=			Prudential Onshore Portfolio Bond	794	5	93	
txit charge year 3 (%)	() + ¥	-		Serier	Portal Onshere Bond	No	3 01	No Maximum	
		_			Versable Investment Portfolio	No	3 01		
Exit charge year 4 (%)	3+ ¥			Scottish Priendly	Scottish Priendly Onshore Bond Platf	Yes		00	
Exit charge year 5 (%)	>= ¥			Scottish Widows	Investment Bond - Initial charge opt	No	4	None	
Exit charge year 6 (%)	>= ¥			Scottish Widows	Investment Bond - Withdrawal charg	No	4	None	
Exit charge year 7 (%)	2. 1			Standard Life Assurance	Grahore Bond (Wrap)	No	5	89	
Exit charge year 6 (%)	2+ -			Standard Life Assurance	Tailored Investment Bond	140	5	None	
Exit charge year 9 (%)	De V			Sterling Assurance	Sterling Investment Bond	Yes	5	80	
and a state of the second s			Trensect	Transact Wrap Onshore Bond	Yes	3 of	None		
Exit charge year 10 (%)	3= V								
Penalty for partial surrender):= V		11						
Penalty for full sumender	>= V		4						

The system displays a pop-up window listing all the contracts, as illustrated by the second screenshot. You simply remove the ticks from any contracts which you don't want to include in your research. Again, you have the option of recording a reason for this which is then shown in suitability reports.

Sexcluded contracts - Internet Explorer	X
http://research.synaptic.co.uk/pManualExclusions.asp?searchid=1EA86E2031A24DB3	A325B
Clear the tick against a contract to exclude it from the research. Contracts in red not meet the current filter on the research, and will not currently be displayed. The "reason" you enter below will be applied to all new manual exclusions.	
 Aberdeen Asset Managers Limited Aberdeen Investment Trust ISA Aberdeen Fund Managers Limited Aberdeen Multi-Manager Unit Trust ISA Aberdeen Fund Managers Limited Aberdeen UK OEIC ISA Aberdeen Fund Managers Limited Aberdeen UK OEIC ISA AEGON Retirement Choices AEGON Stocks & Shares ISA AJ Bell (Investcentre) AJ Bell Investcentre Investment ISA Alliance Trust Savings Limited Individual Savings Account (Inclusive Fee Option) Alliance Trust Savings Limited Individual Savings Account (Standard Fee Option) Artemis Fund Managers ISA 	^
 Ascentric Ascentric Stocks & Shares ISA Avalon Investment Services Freedom ISAs Aviva Investors Aviva Investors Cash Fund ISA Select all Invert selection 	~
Save exclusions Cancel	~

Contracts which are listed in red on this pop-up window are being excluded from the grid because of the conditions you are filtering on. Ticking these contracts in the pop-up exclusion screen will not cause them to be included in the grid until you remove whatever filtering conditions the contracts to not meet.

WARNING! – Once a contract has been manually excluded, it will remain excluded within that piece of research until it is re-included or until it is withdrawn by the product provider. If your

reasons for the exclusion of the contract are in respect of its features, conditions, statistics, performance etc, you should be aware that even if the data changes, the contract will remain excluded. If manual exclusions have been used within **Preset Criteria**, we strongly recommend that manual exclusions are revisited periodically to ensure that the reasons for exclusion remain valid.