

# Can I create a list of linked funds for a contract?

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A full contract factsheet, as described above, includes a section showing all the linked funds available on the contract.

However, this information can also be obtained in a more concise form on a separate screen – i.e. a screen which only shows the linked funds. In addition, this screen lets you tick one or more funds, and then generates a fund factsheet for each one.

This page is illustrated by the first screenshot. You simply tick the funds you want factsheets for, and then click on the **Show Factsheets** button at the top or bottom of the list.



The screenshot shows the Zurich Intermediary Platform interface. At the top, there is a header for "Zurich Intermediary Platform" and "Zurich Intermediary Platform Stocks and Shares ISA Account". Below this, there is a section titled "Linked funds on this contract" with a navigation bar containing "Fund picker", "Save as PDF", "Fund research", "Contract", and "Help".

The main content area is titled "Provider and contract type:" and contains the following information:

- Contract name: Zurich Intermediary Platform Stocks and Shares ISA Account
- Provider: Zurich Intermediary Platform
- Product type: Individual Savings Accounts, ISA

Below this is a table titled "Select funds" with a toolbar containing "Show factsheets", "Graph", "Select all", "Invert selection", "Clear all", and "Show all". The table is titled "FE Global Sectors" and has the following columns: "GL: Absolute Return", "1yr", "3yr", "5yr", "10yr", "Vol.", "Alpha", "QScore", "Crown rating", "IntChg", and "AMC".

GL: Absolute Return	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	IntChg	AMC	
<input type="checkbox"/> Aberdeen UK Flexible Strategy B	2.62	6.33	6.54		1.14	0.55	45	3	0.00	0.75	
<input type="checkbox"/> Absolute Insight W	0.80	2.93	3.17		0.45	0.09	37	4	0.00	0.75	
<input type="checkbox"/> Artemis Pan-European Absolute Return 1 Hedged Acc GBP	9.32								1.00	0.75	
<input type="checkbox"/> Artemis US Absolute Return 1 Hedged Acc									1.00	0.75	
<input type="checkbox"/> Aviva Inv Multi Strategy Target Income 2									0.00	0.75	
<input type="checkbox"/> Aviva Inv Multi Strategy Target Return 2	6.13								0.00	0.75	
<input type="checkbox"/> BlackRock Absolute Return Bond D	-0.37	1.02			0.32		1	2	0.00	0.50	
<input type="checkbox"/> BlackRock Dynamic Return Strategy D									0.00	0.80	
<input type="checkbox"/> BlackRock UK Absolute Alpha D Acc	8.04	5.14	2.49		1.42	0.13	29	1	0.00	0.75	
<input type="checkbox"/> BlackRock UK Absolute Alpha S Acc									1	5.00	0.67
<input type="checkbox"/> BlackRock UK Absolute Alpha S Inc									1	5.00	0.67
<input type="checkbox"/> CF Carlife Strategic Return C Acc	-1.13									4.75	0.75

This page can be opened in two ways:

- By right-clicking on a contract name in a research grid, and choosing the Linked Funds option from the pop-up menu.
- By choosing the Fund Factsheets option from a full contract factsheet.

## Sorting the list of funds

The list of funds can be sorted by clicking on the column headers such as 1yr, Alpha etc. This sorts the funds within every sector, and highlights the column header in bold.

An example of this sorting is illustrated by the screenshot below. As a result of clicking on the **Alpha** header, all the sectors have been sorted so that the funds within them are displayed with the highest alpha values first.



Linked funds on this contract

Fund picker | Save as PDF | Fund research | Contract | Help

**Provider and contract type:**

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Select funds	Show factsheets	Graph	Select all	Invert selection	Clear all	Show all	FE Global Sectors						
<b>GL:Absolute Return</b>													
<input type="checkbox"/> FP Argonaut Absolute Return R Acc GBP	23.59	22.11					2.80	0.82	69	4	0.00	0.75	
<input type="checkbox"/> RWC US Absolute Alpha B GBP	8.31	9.04	7.56				1.82	0.70	66	5	5.00	1.00	
<input type="checkbox"/> Old Mutual Global Equity Absolute Return R Hedged Acc GBP	6.55	8.48	9.22				1.58	0.64	77		0.00	0.75	
<input type="checkbox"/> RWC US Absolute Alpha A GBP	7.82	8.22	6.74				1.86	0.64	58	5	5.00	2.00	
<input type="checkbox"/> Aberdeen UK Flexible Strategy B	2.62	6.33	6.84				1.14	0.55	48	3	0.00	0.75	
<input type="checkbox"/> RWC Europe Absolute Alpha B GBP	-1.33	7.44	5.53				1.54	0.54	49	5	5.00	1.00	
<input type="checkbox"/> RWC Global Innovation Absolute Alpha B GBP	8.16	6.32	6.54				1.83	0.51	75	4	5.00	1.00	
<input type="checkbox"/> RWC Global Innovation Absolute Alpha A GBP	7.52	5.51	5.65				1.86	0.44	67	4	5.00	2.00	
<input type="checkbox"/> Henderson European Absolute Return I Acc	4.72	12.82	8.36				1.47	0.39	29	5	5.00	0.75	
<input type="checkbox"/> Henderson UK Absolute Return I Acc	6.40	9.87	6.59				1.10	0.27	41	5	5.00	1.00	
<input type="checkbox"/> Kames UK Equity Absolute Return B Acc	2.66	4.05	3.58				0.63	0.22	25	4	0.00	0.80	
<input type="checkbox"/> RWC Core Plus B GBP	2.68	1.92	1.14				0.61	0.16	20	3	5.00	0.70	

(Sorting on volatility shows the funds with lowest values first, because lower numbers are better for these metrics.)

### Generating factsheets and graphs

The tickboxes next to each name let you select multiple funds to graph or display factsheets for. You simply tick the funds you want, and then click on the **Factsheets** button or the **Graph** button.

(Please note that firms which have not subscribed to the fund module of Synaptic Research only have access to one type of graph.)

### Fund picker

As well as sorting, you can also use a “fund picker” which does three things:

- Highlights the specific sectors in which you are recommending funds (and hides the other sectors).
- Sorts the remaining sectors on your choice of metric such as alpha, volatility or past performance.
- Automatically selects the best fund in each sector.

This fund picker is described in the next section. It is designed as a quick and simple tool for selecting the funds to use on a contract.

### The Fund Research link

If your firm subscribes to the fund module of Synaptic Research, the menu bar will also include a link labelled **Fund Research**. This is highlighted in the screenshot below.



Linked funds on this contract

Fund picker | Save as PD | **Fund research** | Contract | Help

**Provider and contract type:**

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**Provider:** Zurich Intermediary Platform  
**Product type:** Individual Savings Accounts, ISA

**Select funds**

Show factsheets | Graph | Select all | Invert selection | Clear all | Show all | **FE Global Sectors**

GL:Absolute Return	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	InChg	AMC
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This tool lets you start in-depth fund research into the linked funds available on the contract. It is a more comprehensive alternative to the Fund Picker for occasions when you need to take complex factors into account when picking the funds to recommend. This topic is covered below.