

How do you use the Fund Picker?

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The **Fund Picker** is a tool which is available on the list of linked funds for a contract. It is accessible from the page's menu bar, as illustrated by the screenshot below:

The screenshot displays the AEGON One Retirement Fund Picker interface. At the top, the AEGON logo and 'One Retirement' are visible. A navigation bar contains links: 'Back to report', 'Fund picker' (circled in red), '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 main area is titled 'Select funds' and features a table with columns for 'IMA/ABI/ATC Sectors'. The table lists funds under three categories: ABI Asia Pacific excluding Japan Equities, ABI Deposit & Treasury, and ABI Europe excluding UK Equities. Each fund entry includes a checkbox, fund name, and various performance metrics.

Select funds		Show footnotes	Graph	Save list	Select all	Invert selection	Clear all	Show all	IMA/ABI/ATC Sectors					
ABI Asia Pacific excluding Japan Equities														
<input 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
ABI Deposit & Treasury														
<input type="checkbox"/>	Scot Eq Cash Pn (ARC)	0.46	0.49					0.01	0.04	69	4			0.10
ABI Europe excluding UK Equities														
<input 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

The Fund Picker takes the full list of funds which are available on the contract, and does the following:

- 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.

The Fund Picker can also be accessed from two other places:

- By clicking the right mouse button over a contract name in a filtering grid, and choosing the Fund picker option.
- On the report selection screen, use the **Fund Picker** link in the menu bar.

Using the Fund Picker

The fund picker shows all the sectors in which the contract offers a fund link, and pre-selects any of the sectors on which you have already filtered your research. (However, you can change this default selection of sectors).

You then choose which metric you want to use in order to determine the best fund in each sector. Available options include alpha, volatility and past performance.

The Fund Picker window is illustrated by the screenshot below:

Choose the IMA/ABI/AIC sectors in which you want to pick funds, and then choose how to identify the best fund in each sector.

Sectors you have filtered your research on:

- ABI Balanced Managed (Life Fund)
- ABI UK All Companies (Life Fund)

All other sectors:

- ABI Asia Pacific Excluding Japan (Life Fund)
- ABI Cautious Managed (Life Fund)
- ABI Commodity & Energy (Life Fund)
- ABI Defensive Managed (Life Fund)
- ABI Europe Excluding UK (Life Fund)
- ABI Flexible Managed (Life Fund)
- ABI Global Emerging Markets (Life Fund)
- ABI Global Equities (Life Fund)

Pick the fund in each sector with the best Alpha

Note that there is a choice of which sector definitions are shown (FE Global or IMA/ABI). This choice will not be given if a choice was already made on the Sectors tab or the PP tab.

The results of the Fund Picker

The results of the Fund Picker are illustrated by the screenshot below. All sectors other than the selected ones are hidden. The remaining sectors are sorted so that the funds within them are displayed in order of your chosen metric. And the system automatically selects the best fund in each sector based on the chosen metric.

SYNAPTIC SOFTWARE **AEGON**
One Retirement

Linked funds on this contract Back to report | Fund picker | Save as PDF | Fund research | Contract | Help

Provider and contract type:

Contract name: One Retirement
 Provider: AEGON
 Product type: Personal Pension (Fully Insured)

Select funds Show factsheets Graph Save list Select all Invert selection Clear all Show all **IMA/ABI/AIC Sectors**

	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	InChg	ANC
ABI Asia Pacific excluding Japan Equities										
<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
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If you want to re-show all the other sectors (which have been hidden), then you click on the **Show all** button.