What fund graphs can I find on Synaptic Research?

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Synaptic Research provides a wide range of fund graphs, see below.

(Please note that firms who have only subscribed to Synaptic Research's product module only have access to the annual performance graph.)

- Cumulative performance
- Monthly premium
- Annual premium
- Annual performance
- Alpha vs. beta
- Quartile rankings
- Returns each month
- Distribution of returns
- Performance vs. volatility
- Best/worst returns
- Sector position
- Asset allocation
- Stochastic projections (5- and 10-year models)
- Portfolio value
- Portfolio composition

Removing funds from a graph

When graphing multiple funds you can temporarily remove funds from the graph using the **Funds and Weightings** button on the graph window's toolbar. This button also lets you set the weightings which are used in portfolio value and composition graphs.

Time periods for graphs

You can change the time period for a graph using the second drop-down box in the graph window's toolbar. However, some graphs used a fixed time period, and therefore this box becomes greyed-out and disabled when these types of graph are selected.

The standard options in the drop-down box are the last ten years – i.e. the last year to date, the last two years to date etc. However, some types of graph also let you choose a bespoke time period. Where applicable, the final entry on the drop-down list will be **"Bespoke…"** This entry will not be displayed if the selected graph does not allow bespoke time periods.

You set the bespoke time period using the options on the Funds and Weightings page. This page is automatically displayed by the system the first time that you choose the **"Bespoke entry"** from the drop-down list. The system then continues to use the same time period whenever you choose

the bespoke option until you change to a new one by using the **Funds and Weightings** button to re-open the options page.

Printing graphs

Graphs can be printed by saving them in PDF form (using the **Save as PDF** button on the graph window's toolbar), and then printing the resulting PDF document. This is a more reliable solution than printing directly from your browser's Print command, as the PDF is optimised for printing, whereas the browser view is optimised for viewing and may not print correctly.

Graph options

In addition to the time period detailed above, most graphs have options to customise the depiction of the fund(s) being displayed. Not all options are available for all graphs.

- **Sector / index** – add another set of values to the graph – this can be a sector average (not available if the graph is for several funds from more than one sector), an index, or even a user-defined portfolio.
- **As baseline** – plots the chosen fund(s) against the selected sector, index or portfolio, but sets the latter as the baseline of the graph and plots the fund relative to it (thus showing relative performance,rather than absolute).
- **Interpolate** – By default, the visual representation of some Synaptic Research graphs is smoothed to provide a more understandable view. This can be turned off by de-selecting the Interpolate checkbox, which then "un-smooths" the graphs, showing straight lines (or bars) for values.
- **Show key values** – adds high-point and low-point and end values to the graph

Where are the links/buttons for creating fund graphs?

Fund graphs can be created from a number of places within Synaptic Research:

- The menu bar for a fund factsheet includes a **Graph** link.
- The list of linked funds on a contract lets you select one or more funds to graph.
- In a grid of fund research, you can right-click over a fund name and choose **Graph** from the pop-up menu.
- In a grid of fund research, you can compare multiple funds using the **Graph** button on the grid's toolbar.
- In the ranking results for fund research, use the **Fund Graph** link in the menu bar.