

How do I filter on Statistics?

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

The **Stats** tab lists a variety of statistics about contracts - financial strength, investment flexibility in terms of linked funds and sectors, plus charges and premium information about contracts (all dependent on the type of product). For example it may include projected maturity and surrender values.

For each field you can enter a value and choose whether to filter on '**equal to that exact value**' (**=**), '**less than or equal to that value**' (**>=**) or '**more than or equal to that value**' (**<=**):

The screenshot shows a 'Filtering' window with a 'Stats' tab selected. The interface includes a navigation bar with 'Features', 'Sectors', 'Conditions', 'Stats', and 'PP'. Below this, there are several filter rows, each with a dropdown menu for the operator and a text input for the value. The filters are:

- AKG Unit Linked Business: Operator **>=**, Value **3**
- Moody's rating: Operator **>=**, Value (empty)
- Fund link statistics**
- Linked funds: Operator **>=**, Value (empty)
- Linked sectors: Operator **>=**, Value (empty)
- Maturity Values**
- Age 30, retiring at 55, £10k: Operator **>=**, Value (empty)
- Age 40, retiring at 55, £10k: Operator **>=**, Value (empty)
- Age 50, retiring at 55, £10k: Operator **>=**, Value (empty)
- Age 30, retiring at 60, £10k: Operator **>=**, Value (empty)
- Age 40, retiring at 60, £10k: Operator **>=**, Value (empty)
- Age 50, retiring at 60, £10k: Operator **>=**, Value (empty)
- Age 30, retiring at 65, £10k: Operator **>=**, Value **70000**
- Age 40, retiring at 65, £10k: Operator **>=**, Value (empty)
- Age 50, retiring at 65, £10k: Operator **>=**, Value (empty)
- Age 60, retiring at 65, £10k: Operator **>=**, Value (empty)
- Age 30, retiring at 70, £10k: Operator **>=**, Value (empty)
- Age 40, retiring at 70, £10k: Operator **>=**, Value (empty)

At the bottom of the window, there are three buttons: 'Clear all filters', 'Audit trail', and 'Import filter'.

In the example above, the list of contracts has been filtered on AKG financial strength rating of at least 3 and a projected maturity value of at least £70,000 for a £10,000 lump sum contribution retiring at 65.

You may find it useful when using **Stats** to filter on to add the column into the grid and view the different results for each of the products. This might help to give you an idea of what result you should be searching on.