

How do I manually exclude contracts?

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As well as (or instead of) filtering the grid of contracts, you can also manually select contracts to be excluded.

Note - Manual exclusion only applies to product research. It is not available on fund research.

You can specify the contracts to exclude by one of two ways:

Excluding individual contracts

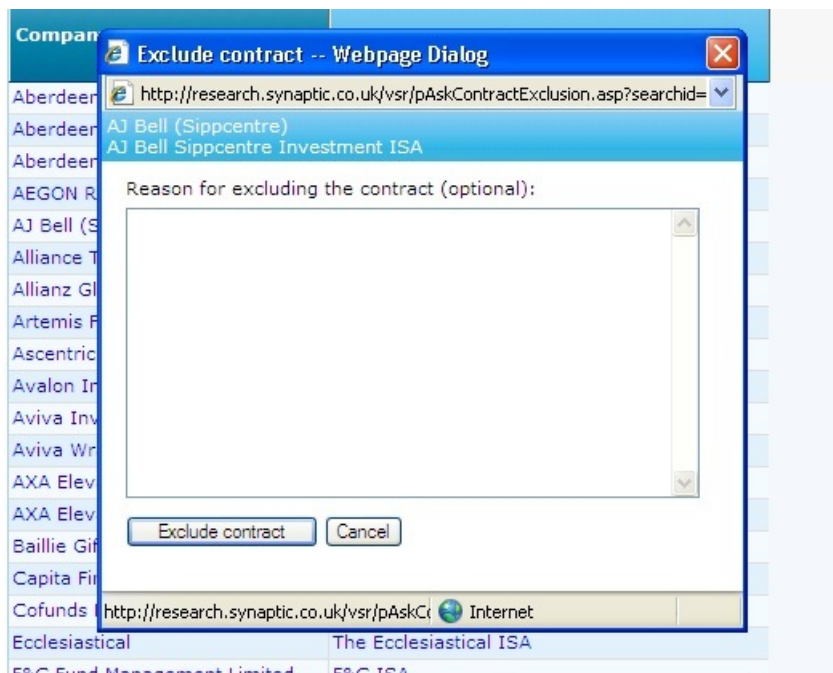
You can remove an individual contract from the Filtering screen by right clicking on the contract name, within the grid, and selecting **Exclude contract**:



The screenshot shows a table with a header bar indicating 'All 75 contracts - 0 manually excluded'. The table has two columns: 'Company' and 'Contract'. A context menu is open over the 'Contract options' column, listing several actions: 'View contract details', 'Linked funds', 'Fund picker', 'Exclude contract', and 'View contract notes'. The 'Exclude contract' option is highlighted.

Company	Contract
Aberdeen Asset Management	Aberdeen Investment Trust ISA
Aberdeen Asset Management	Aberdeen Multi-Manager Unit Trust ISA
Aberdeen Asset Management	Aberdeen UK OEIC ISA
AEGON Retirement Choices	AEGON Stocks & Shares ISA
AJ Bell (Sippcentre)	AJ Bell Sippcentre Investment ISA
Alliance Trust Savings Limited	Contract options Component
Allianz Global Investors	View contract details
Artemis Fund Managers	Linked funds
Ascentric	Fund picker res ISA
Avalon Investment Services	Exclude contract
Aviva Investors	View contract notes ment ISA
Aviva Wrap UK Ltd	Aviva Wrap ISA Portfolio
AXA Elevate	Elevate Stocks & Shares ISA - Composite
AXA Elevate	Elevate Stocks & Shares ISA - Explicit
Baillie Gifford	Baillie Gifford Investment Trust ISA
Capita Financial Managers	ISA
Cofunds Ltd	ISA
Ecclesiastical	The Ecclesiastical ISA

A pop up window will be displayed giving you the option to enter a reason for why the contract has been excluded. The reason will be included in the any of the research reports:

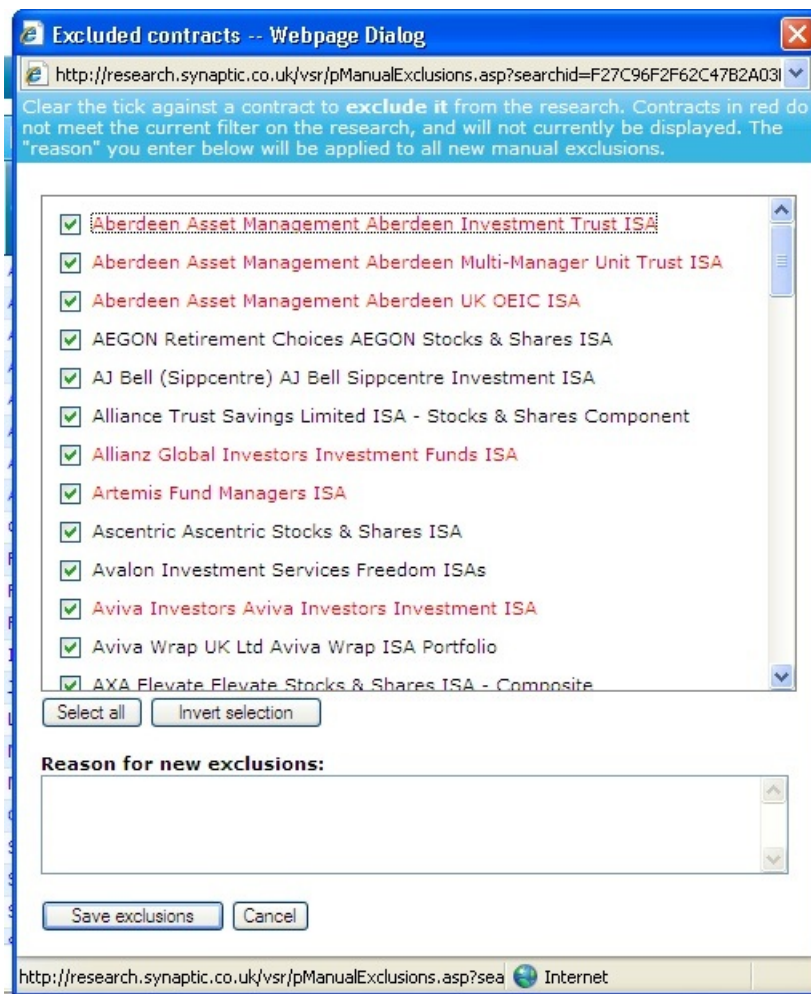


Excluding multiple contracts

You can exclude several contracts at once by clicking on the link at the top of the grid where it says **'0 manually excluded'**:

All 75 contracts - 0 manually excluded	
Company	Contract
Aberdeen Asset Management	Aberdeen Investment Trust ISA
Aberdeen Asset Management	Aberdeen Multi-Manager Unit Trust ISA
Aberdeen Asset Management	Aberdeen UK OEIC ISA

A pop up window will be displayed listing all the contracts:



Simply remove the ticks from any contracts which you don't want included in the research. You have the option of recording a reason for the exclusion at the bottom of the screen, which will be displayed in the Research reports.

Contracts that are highlighted in red have already been excluded due to the features, sectors, etc that have already been selected.

Please note - 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.
