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:**

| 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 | |
| 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 Artemis Fund Managers Ascentric | View contract details Linked funds Fund picker res ISA | |
| Avalon Investment Services Aviva Investors | Exclude contract 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:

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|-------------|--|--|
| compan | 🖉 Exclude contract Webpage Dialog 🛛 🛛 🔀 | |
| Aberdeer | 🔊 http://research.synaptic.co.uk/vsr/pAskContractExclusion.asp?searchid= 💙 | |
| Aberdeer | AJ Bell (Sippcentre) | |
| Aberdeer | AJ Bell Sippcentre Investment ISA | |
| AEGON R | Reason for excluding the contract (optional): | |
| AJ Bell (S | <u>^</u> | |
| Alliance T | | |
| Allianz Gl | | |
| Artemis F | | |
| Ascentric | | |
| Avalon Ir | | |
| Aviva Inv | | |
| Aviva Wr | | |
| AXA Elev | ~ | |
| AXA Elev | | |
| Baillie Gif | | |
| Capita Fir | | |
| Cofunds I | http://research.synaptic.co.uk/vsr/pAskC(🌏 Internet | |
| Ecclesiast | ical The Ecclesiastical ISA | |
| E&C Fund | F&C Fund Management Limited F&C ISA | |

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:

| | 🖻 Excluded contracts Webpage Dialog 🛛 🛛 🔀 |
|------|--|
| | 🔊 http://research.synaptic.co.uk/vsr/pManualExclusions.asp?searchid=F27C96F2F62C47B2A03 😒 |
| | Clear the tick against a contract to exclude it from the research. Contracts in red do not meet the current filter on the research, and will not currently be displayed. The "reason" you enter below will be applied to all new manual exclusions. |
| | 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 ISA - Stocks & Shares Component Allianz Global Investors Investment Funds ISA Artemis Fund Managers ISA Avalon Investment Services Freedom ISAs Avalon Investors Aviva Investors Investment ISA Aviva Investors Aviva Investors Investment ISA |
| | AVIVA Wrap UK Ltd AVIVA Wrap ISA Portfolio AXA Elevate Elevate Stocks & Shares ISA - Composite |
| L | Select all Invert selection |
| | Reason for new exclusions: |
| 0 10 | Save exclusions Cancel |
| ł | http://research.synaptic.co.uk/vsr/pManualExclusions.asp?sea 🎱 Internet |

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.