Can I filter on specific linked funds?

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

As well as – or instead of – filtering on sectors, you can also eliminate contracts which do not offer specific linked funds. The functionality for doing this is at the bottom of the sectors list.

Filtering		F Ranking F Report F Quete Comparison Change title Sove as PDF Delete Copy Send Not shared He						
Features Sectors Conditions Stats PP 🔳		S contra	cts out of 20 (25%) - 0 manually excluded		Options			
Property - Direct UK (Investment Trust)	^	Company	Contract	Life Fundsi ABLUK Ali				
Property - Securities (Investment Trust)				Companies				
Specialist (Investment Trust)		AXA Wealth	Investment Bond (Adviser Charging)	Yes				
Tech Hedia & Telecomm (Investment Trust)		Canada Life	Cantrivest Select Account	Yes				
		Legal & General Standard Life Assurance Ltd	Select Portfolio Bond	Yes				
UK All Companies (Investment Trust)		Standard Life Assurance Ltd Sterling Assurance	Tailored Investment Bond Sterling Investment Bond	Yes				
UK Equity & Bond Income (Investment Trust)		atening Assurance	stening investment eone	res				
UK Equity Income (Investment Trust)								
UK Smaller Companies (Investment Trust)								
VCT Generalist (Investment Trust)								
With Profit (Unitised) IB (Life Funds)								
Contracts must include a link to all v of the following funds. Click here to add another fund, or dear the list.								
Fidelity American Acc								

In the first screenshot, contracts are being eliminated unless they offer either of Fidelity's American or UK special situations funds. Changing the drop-down field from **"any"** to **"all"** would eliminate contracts unless they offered both funds (rather than either fund).

Funds can be added to this list by clicking on the link at the bottom of the list of sectors. This displays a pop-up box for searching for funds, as illustrated by the second screenshot. Once you have found matching funds, you can either select a single one by clicking on its name, or multiple funds by ticking the boxes next to them and then clicking on the **Save selection** button.



Once you have added funds to the filtering list (as in the first screenshot), you can remove them again simply by clicking on their names.

Importing funds from a manual list

If you subscribe to the fund module of Synaptic Research, there is an additional option. This is highlighted in the screenshot below (and is not displayed if you only subscribe to the Product module).

Filtering		+ Ranking + Report + Quste Comparison Charge title Save as PDF Delete Copy Send Not shared No 12 contracts out of 20 (60%) = 0 manually excluded Option						
Private Equity (Investment Trust) Property - Direct UK (Investment Trust)	^	Company	Contract	Life Punds: ABI UK All Companies	- Cpoort			
Property - Securities (Investment Trust)		Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option	Yes				
		AXA Wealth	Investment Bond (Adviser Charging)	Yes				
Specialist (Investment Trust)		Canada Ufe	CanInvest Select Account	Yes				
Tech Nedia & Telecomm (Investment Trust)		Legal & General	Select Portfolio Bond	Yes				
UK All Companies (Investment Trust)		Prudential Intermediary Division	Prudence Inheritance Bond	Yes				
		Prudential Intermediary Division	Prudential Investment Plan (PIP)	Yes				
UK Equity & Bond Income (Investment Trust)		Sanlam	Versatile Investment Portfolio	Yes				
UK Equity Income (Investment Trust)		Scottish Widows	Investment Bond - Initial charge option	Yes				
UK Smaller Companies (Investment Trust)		Scottish Widows	Investment Bond - Withdrawal charge option	Yes				
		Standard Life Assurance Ltd	Onshore Bond (Wrap)	Yes				
VCT Generalist (Investment Trust)		Standard Life Assurance Ltd	Tailored Investment Bond	Yes				
With Profit (Unitised) 18 (Life Funds)		Sterling Assurance	Sterling Investment Bond	Yes				
Contracts must include a link to all v of the following funds. (No specific funds required. Click here to add a lund, or impact from a manual fund list.)	~							

You can import the funds you want to filter on from an existing manual fund list. In this instance, the manual fund list acts like a list of "favourites". You can set up the manual list once, and then use it in filtering any number of pieces of product research.

Very simply, Synaptic Research reads all the funds on the manual fund list, and then filters your product research based on whether each contract offers all of those funds.