

How can I filter on Past Performance?

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The Past Performance (**PP**) tab shows the same list of sectors as the **Sectors** tab. Note - the sector classification shown on the **PP** tab will follow the sector classification choice made on the **Sectors** tab. If no sector classification choice has been made on the sectors tab, the selection will need to be made on the **PP** tab before the sector list is generated.

Within each sector there are fields for various past performance metrics - you can view the fields within each sector by selecting the sector name:

Features	Sectors	Conditions	Stats	PP
IMA Technology & Telecoms (Unit Trust)				
IMA UK All Companies (Unit Trust)				
6 month	>=			
9 month	>=			
1 year	>=			
2 year	>=			
3 year	>=			
4 year	>=			
5 year	>=			
6 year	>=			
7 year	>=			
8 year	>=			
9 year	>=			
10 year	>=			
Quartile consistency	>=			
Alpha	>=			
Crown Rating	>=			
Volatility	>=			

Clear all filters Audit trail Import filter

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

In the example below the list of contracts have been filtered so that it only includes contracts which have a UK All Companies fund with a positive alpha:

Filtering Ranking Report

Features Sectors Conditions Stats **PP**

FE Global IMA/ABI/AIC

ABI Deposit & Treasury (Pension Funds)

6 month

9 month

1 year

2 year

3 year

4 year

5 year

6 year

7 year

8 year

9 year

10 year

Quartile consistency

Alpha

Crown Rating

Clear all filters Audit trail Import filter

All 106 contracts - 0 manually excluded

Company	Contract
Aberdeen Asset Managers Limited	Aberdeen Investment Trust ISA
Aberdeen Fund Managers Limited	Aberdeen Multi-Manager Unit Trust ISA
Aberdeen Fund Managers Limited	Aberdeen UK OEIC ISA
AEGON Retirement Choices	AEGON Stocks & Shares ISA
AJ Bell (Sippcentre)	AJ Bell Sippcentre Investment ISA
Alliance Trust Savings Limited	Individual Savings Account (Inclusive Fee Option)
Alliance Trust Savings Limited	Individual Savings Account (Standard Fee Option)
Amber Financial Investments Ltd	The Amber ISA
Artemis Fund Managers	ISA
Ascentric	Ascentric Stocks & Shares ISA
Avalon Investment Services	Freedom ISAs
Aviva Investors	Aviva Investors Cash Fund ISA
Aviva Investors	Aviva Investors Investment ISA
Aviva Wrap UK Ltd	Aviva Wrap ISA Portfolio
AXA Elevate	Elevate Stocks & Shares ISA - Explicit
Baillie Gifford	Baillie Gifford Investment Trust ISA
Cambridge Building Society	2 Year Fixed Rate ISA (Issue 13)
Cambridge Building Society	5 Year Fixed Rate ISA (Issue 5)
Cambridge Building Society	Instant Access ISA (Issue 3)

Showing which fund is being used

Synaptic calculates a contract's past performance in a sector by taking the single best-performing fund which is available. In the above example, the contracts remaining in the list have at least one UK All Companies fund with a positive alpha. They may have other funds in the same sector with a negative alpha.

You can see which fund is being used by adding the field to the grid. Click on the field name in the **PP** tab, in this case **Alpha**. Once it is displayed in the grid, click on the number:

Company	Contract	Unit Trust: IMA UK All Companies - Alpha	
AJ Bell (Sippcentre)	AJ Bell Sippcentre Investment ISA	1.78	
Ascentric	Ascentric Stocks & Shares ISA	1.78	
Avalon Investment Services	Freedom ISAs	1.78	
Aviva Wrap UK Ltd	Aviva Wrap ISA Portfolio	1.78	
AXA Elevate	Elevate Stocks & Shares ISA - Composite		Filter options
AXA Elevate	Elevate Stocks & Shares ISA - Explicit		Greater or equal to
Cofunds Ltd	ISA		Less or equal to
Fidelity FundsNetwork	FundsNetwork		Equal to
Fidelity FundsNetwork	FundsNetwork - Account Fee		Show fund
Novia	Novia Stocks & Shares ISA		Show contents

Select **Show fund** from the pop up menu. A window will then be displayed showing the fund that is being used:

15 contracts out of 75 (20%) - 0 manually excluded

Company	Contract	Unit Trust: IMA UK All Companies - Alpha
AJ Bell (Sippcentre)	AJ Bell Sippcentre Investment ISA	1.78
Ascentric	Ascentric Stocks & Shares ISA	1.78
Avalon Investment Services	Freedom ISAs	1.78
Aviva Wrap UK Ltd	Aviva Wrap ISA Portfolio	1.78
AXA Elevate	Elevate Stocks & Shares ISA - Composite	2.31
AXA Elevate	Elevate Stocks & Shares ISA - Explicit	2.31
Cofunds Ltd	ISA	1.78
Fidelity FundsNetwork	FundsNetwork	1.78
Fidelity FundsNetwork	FundsNetwork - Account Fee	1.78
Novia	Novia Stocks & Shares ISA	1.78
Nucleus		1.78

Fund used for past performance -- Webpage Dialog

<http://research.synaptic.co.uk/vsr/pShowPPFund.asp?searchid=F27C96I>

IMA UK All Companies - Alpha

Fund: EFA New Horizon Income & Growth A Inc

Promoter: WAY Fund Managers

Sector: IMA UK All Companies

Close window Fund factsheet