

How do I use the Fund Picker?

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Once a piece of product research has been worked through to **Reports** and the contract to be recommended has been selected, there will be a button called **Fund Picker**.

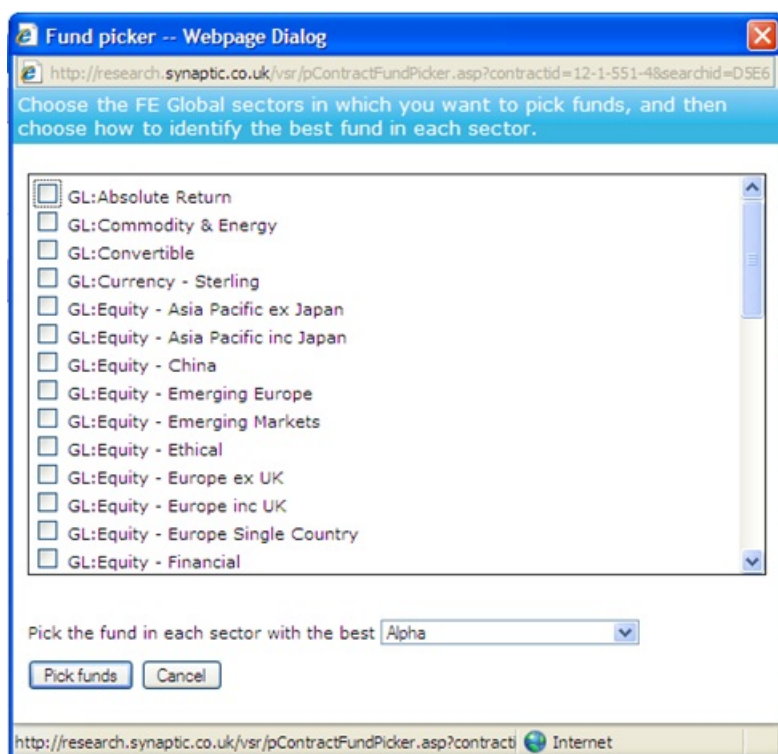
Investment Bond, Unit Linked

| Fund picker | < Back to ranking | < Back to filtering | > Quote | Help

Click on this and you will get the following options:

- 1) Choose a sector and the criteria for the system to select the best fund available, for that criteria, for the contract;
- 2) Choose the funds from the list available for this contract.

Starting with option 1



With this, choose the criteria which you wish to use for the fund with the best criteria. Choose from **Pick the fund** in each sector with the best '**Alpha**'. Now select the sectors that you wish to use.

Now click, **Pick Funds**.

A page will appear with the sectors chosen, a list of funds for these sectors and the best fund, within each sector, for the chosen criteria is highlighted:

Select funds										
FE Global Sectors										
GL:Equity - Emerging Markets	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	IntChg	AMC
<input checked="" type="checkbox"/> Aberdeen Emerging Markets A Acc	5.18	13.49	12.31	19.00	5.01	0.98	74	5	4.25	1.75
<input type="checkbox"/> First State Global Emerging Markets Leaders B GBP Acc	11.92	15.14	13.60		4.13	0.80	62	5	4.00	0.85
<input type="checkbox"/> JPM Emerging Markets A Acc	-1.61	6.48	4.85	15.57	5.53	-0.02	61	4	4.25	1.50
<input type="checkbox"/> First State Global Emerging Markets Leaders A GBP Acc	11.18	14.38	12.91		4.13	0.74	56	5	4.00	1.50
<input type="checkbox"/> Lazard Emerging Markets Ret Inc	1.26	8.48	6.08	16.29	5.39	0.16	51	5	3.75	1.50
<input type="checkbox"/> Dimensional Emerging Markets Targeted Value C Inc GBP	-6.32	7.67			6.19	0.16	47	3	0.00	0.75
<input type="checkbox"/> Vanguard Emerging Markets Stock Index Acc GBP	-3.78	7.04			5.54	0.11	46	3	0.40	0.55
<input type="checkbox"/> Vanguard Emerging Markets Stock Index Inc GBP	-3.77	7.04			5.54	0.11	46	3	0.40	0.55

Click **Save list** for these funds to be shown on the research reports.

Option 2:

You can ignore the sectors box that appears after clicking on **Fund Picker**.

You will be presented with a list of all the sectors with their funds and from this you can choose the required funds.

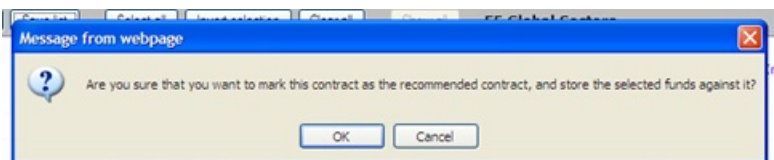
<input type="checkbox"/> Premier Global Power and Water R Inc	-7.89	-3.50	-7.33	4.80	4.73	-0.67	16	1	4.25	1.50
<input type="checkbox"/> Sarasin AgriStar A Acc	3.39	6.60			4.02	0.17	6	1	5.00	1.50
<input type="checkbox"/> Sarasin AgriStar A Inc	3.45	6.57			4.01	0.17	6	1	5.00	1.50
<input type="checkbox"/> Smith & Williamson Global Gold & Resources A Inc	-28.71	11.31	10.08		7.95	0.56	56	2	5.00	1.75
GL:Convertible	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	IntChg	AMC
<input type="checkbox"/> Aviva Investors Global Convertibles Ax hedge GBP	5.52	6.16			2.37	0.39	19	5	5.00	1.20
<input type="checkbox"/> M&G Global Convertibles A Acc GBP	3.05	5.35	6.81		2.78	0.19	31	2	4.00	1.50
<input type="checkbox"/> M&G Global Convertibles A Inc GBP	3.04	5.33	6.62		2.78	0.19	31	2	4.00	1.50
GL:Currency - Sterling	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	IntChg	AMC
<input type="checkbox"/> Aviva Inv Cash 1 Acc	0.21	0.24			0.03	0.02	1	1	0.00	0.50
<input type="checkbox"/> Aviva Inv Cash 1 Inc	0.24	0.26			0.03	0.02	1	1	0.00	0.50
<input type="checkbox"/> Baillie Giff Cash A Inc	0.26	0.22	1.20	2.25		0.02	37	5	0.00	0.10
<input type="checkbox"/> BlackRock Cash A Acc	0.17	0.16	1.33	2.23	0.02	0.01	28	1	0.00	0.50
<input type="checkbox"/> BlackRock Cash A Inc	0.15	0.14	1.37	2.31	0.04	0.02	49	1	0.00	0.50
<input type="checkbox"/> Elite Income Plan Cash Acc	0.33	0.24	1.11	1.74	0.03	0.02	12	3	5.25	0.00
<input type="checkbox"/> F&C Money Markets 1	-0.57	-0.56	0.50	1.52	0.02	-0.05	1	1	0.00	0.30
<input type="checkbox"/> Fidelity Cash A Acc GBP	0.25	0.23	1.34	2.29	0.01	0.02	45	4	0.00	0.40
<input type="checkbox"/> Fidelity Cash A GBP	0.25	0.22	1.31	2.29	0.01	0.02	44	4	0.00	0.40

Simply click on the box to the left of the fund to select and once all funds are chosen, click

Select funds										
FE Global Sectors										
GL:Absolute Return	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore			
<input type="checkbox"/> Aviva Inv UK Absolute Return A	-5.68	-4.44			1.74	-0.52	1			
<input type="checkbox"/> BlackRock UK Absolute Alpha P Acc	-0.51	-1.25	1.75		1.12	-0.28	5			
<input type="checkbox"/> Cazenove Absolute UK Dynamic P1 Acc GBP	4.29						41			
<input type="checkbox"/> Cazenove UK Absolute Target P1 GBP	7.06	1.08			1.61	0.04	8			

on **Save List**:

A message will appear:



Select **OK**.

There will now be a section in the research reports which looks similar to the screen shot below:

Selected contract and funds

The selected company is **HSBC Life (UK) Ltd**
 The selected contract is **HSBC Onshore Investment Bond (Ascentric)**.

The recommended funds on this contract are as follows:

- Elite Income Plan Cash Acc
- Fidelity Moneybuilder Cash ISA A GBP
- M&G Global Convertibles A Acc GBP

This is how **HSBC Life (UK) Ltd** describe themselves:

HSBC Life (UK) Ltd is member of the HSBC Group, one of the world's largest banking and financial services organisations with some 10,000 offices in 82 countries and territories.