

# How to generate Fund factsheets

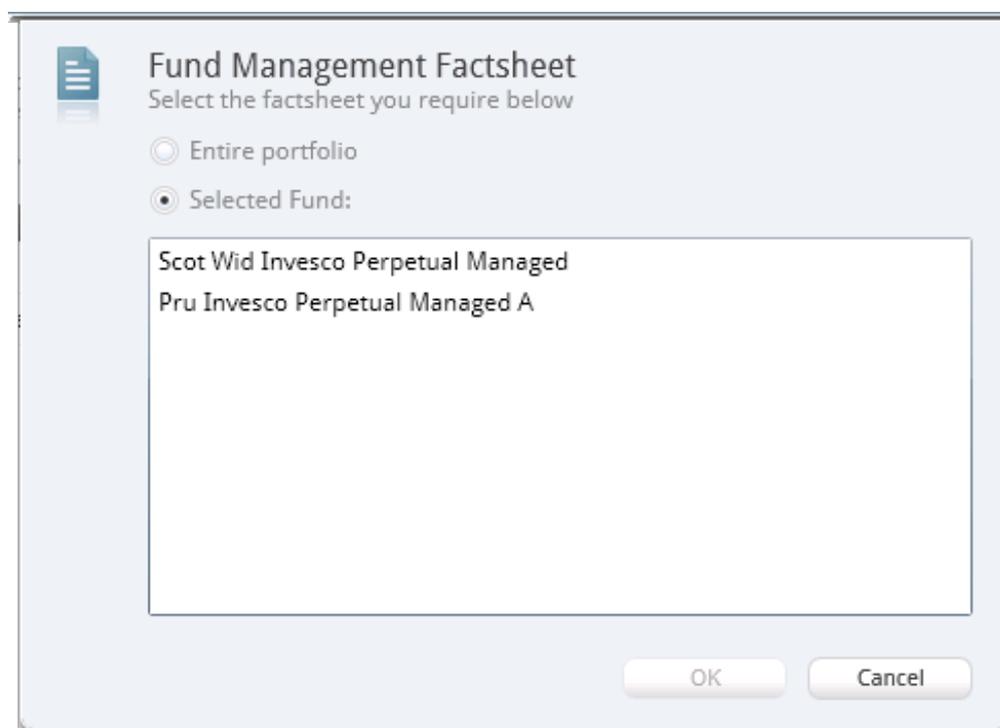
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In certain parts of Synaptic Comparator, you have the ability to view the factsheets of any funds you are working with.

To view a factsheet, click the factsheets icon in the top menu:



A new menu will appear:



You have up to three options depending on where you are in the system, **Selected Fund**, **Weighted portfolio** or **Entire portfolio**.

To generate a single fund factsheet, make sure **Selected Fund** is selected, click on the fund you wish to see the factsheet for and click **OK**.

To generate a **Weighted portfolio**, select **Weighted portfolio**, click **OK**. A factsheet will then be generated that shows the portfolio with the fund splits in place.

To generate a factsheet for the entire portfolio (all funds you have selected, this could be in **Fund Panel**, **Portfolio builder** or even in the main **Synaptic Comparator** Screen) select **Entire Portfolio** and then **OK**.

Factsheets will then open in PDF format, if you are within a client record, the generated factsheet will be available for that client within the **Contacts** area under Activities.

Activities	Activity Detail
5 available	type Comparison
Portfolio Factsheet - .pdf 3 Nov 2011 2:51pm	created 3 Nov 2011 2:51pm
Portfolio Factsheet - .pdf 3 Nov 2011 2:50pm	created by
Portfolio Factsheet - .pdf 3 Nov 2011 2:47pm	last updated 3 Nov 2011 2:51pm
Test 2 3 Nov 2011 2:45pm	name <input type="text" value="Portfolio Factsheet - .pdf"/> <input type="button" value="Update"/>
Test 19 Oct 2011 3:33pm	notes No notes available for this activity.
	documents
	Portfolio Factsheet - .pdf