

What are the different types of fund research?

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Synaptic Research provides four types of fund research:

- Research into unit trusts, life funds, pension funds, and offshore funds and investment trusts.
- Research into all the funds offered by a single promoter (such as Fidelity or Merrill Lynch).
- Research into all the funds available on a specific contract (e.g. Selestia's investment bond).
- A manual list of funds – i.e. your ad hoc selection of the funds to research.
- Data on sectors and indexes.

The same data – i.e. fields on the Features, Stats tabs etc. – is available in all types of fund research. (However, firms who only subscribe to the product module of Synaptic Research only get a much more limited range of fields.)

Research into unit trusts, life funds etc. is intended for general analysis of the fund market, or for occasions when a client wants to make a direct investment in unit trusts outside of a wrapper such as an investment bond or ISA.

Research into the linked funds available on a contract provides in-depth analysis of the investment options when you already know which contract you are recommending. In effect, you complete two pieces of research: one into the product type to determine which contract to recommend, and then a second piece of research into the funds available on the selected contract.

Manual fund lists have a number of uses, and these are covered in more detail below.
