Are there any tips when using fund research?

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Synaptic Research obviously responds faster if there are fewer funds which it needs to display in the grid. Therefore, wherever possible, it's best to set up filtering, using the **Features** and **Stats** tabs, **before** you add funds to the grid using the **Sectors** tab. Let's say that you are going to research all unit trusts in the UK All Companies sector, and you are only interested in funds with positive alpha, whose average quartile ranking is 2.5 or better, and which have been around for at least five years. It's more efficient to set up this filtering first (using the Stats tab as illustrated by the screenshot below) and then add the sectors using the Sectors tab, rather than selecting the sectors first and then filtering the grid down.

Features Sectors Conditions State Quartile ranking 3 years >= >= Quartile ranking 3 years >= Quartile ranking 5 years >= >= >= >=	~		Showing 1 to 1 of 1 fund		Facts	have II		
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Quartile ranking 5 years	~	~		Risk	Quartiles: Avg.	Fund details:	Investment Trust: UK	
	_		Fund	metrics: Alpha	quartile	Years of data	All	
	~		Crystal Amber	1.62	3	7	Yes	
Quartile ranking 10 years >=	~							
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Fund features

The Features tab of fund research includes a number of items which are quick ways of filtering out funds based on minimum performance requirement. The Top Crown rating field eliminates contracts unless they are top-ranked (i.e. 5 Crowns) by FE; the quartile features eliminate funds unless they have been top-quartile performers over the chosen period. All of these are simply quick ways of imposing conditions which can also be set via the Stats tab. The first screenshot below shows filtering on the features for the FE Crown rating, and on quartile ranking over 3 years.

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34. Nixed Directivers Church Shares (and Yout)	Aural .	performant la				End Tools En UK All Companies	
34 Riand Decembershi 20% 40% Dames (Shill Trush)		acters.				and the second second	
In Nixed Investment 40%-45% Shares Cont Trust	Registre LX Hull Cap J. Son Did Mutani UK Hull Cap A Acc	26.20	14	676.88	5a	Yes	
	Barcleve UK Lower Cap A Acc	16.20	1.5	1871.76	80	766	
Churt Sno) Suites and AL	HTH Eater Crewith	18.12	1.0	201.27		100	
34 Sorth Reama (Unit Trust)	FBC UK Rid Cap 1 Acc	13.49	1.1	25.57		784	
) In North American Smaller Companies (Unit Fruet)	Aberdeen Property Share A Acc	15.50	1.5	400.4	144	80	
	Danial UP Investments UK Equity Unserainting	14.56	1.0	1287	64	Ves.	
34. Personal Pensional (and Trust)	Edentries UK Basely Dravits A	14.88	1.5	181.21	84	786	
2 34 Property (Unit Trust)	Threadneadle UK Mid 250 Rat Acc	54.02	1.5	120.25	80	760	
A Prosected (Junit Truet)	Premier Part European Property & Inc.	14.13	1.8	126.47	Ves.	44	
	Franklin UK: Panagers Poous & Ass	13.79	1.1	134.28	No	786	
34 Short ferm Honey Harket (Unit Hyst)	Cevenduk Opportunities A	12.45	1.5	130.37	80	788	
34 Specialist (Joh Trust)	Lisetnus Special Stuations 8 Inc.	13.51	1.76	1492.3	84	Vis.	
14 Starling Corporate Bond (Linit Trust)	Premier Billion A. Std	13.99	1.8	101.61	hi	786	
	Name of Growth Inc.	12.77	1.5	15/30-89	80	798	
34. Barling High Yand (Sell Yund)	Renderson UK Equity Income & Granth & Inc	12.51	1.5	981.83	84	104	
34 Declary Dealegic Band (Unit Trust)	Edwader UK Rid 230 A Aus	11.5	1.0	1187	Re .	786	
34 Targated Absolute Return (Unit Truet)	Majedie UK Popus A	12.25	1	429	50	760	
The reduce econe server they were	Harltensugh UK Halt: Cap Growth & Dre	13.14	1.5	91.21	84	200	
34 Technology & Telecome (and Trust)	Bandard Life Swedments UK Bhisal Rel	12.14	1.1	240.8	Re.	786	
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	OVH UK Growth &	13.46	1.8	126.90	60	100	
34 UK Boults & Bend Broome (Unit Thut)	BLR Revers UK Dynamic Rel	11.00	1.1	10	No.	716	
34 UK Bouls Shore (2nd Ywd)	Investo Persetuel High Shoene Inc.	11.09	1.87	11123-38	50	710	
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	Drumpe Pergetual UK Perus Ass Strumped UK Algha # Acc OBP	11.50	1.5	454.87	80	766	
3 skurctrates - Ginket Gits Ounit Huad	Controls Widows HOTHS LIK Constants 1	11.54	1.5	26.74	80	Vas	
34 UK Smaller Companies (Unit Trust)	Investor Waterial UK Granith Ass	11.04	1.85	1131.12	-	100	
14 Undessified (Unit Trust)	NEW UK Starty Unconstrained a	11.28	1/2	7.68	80	714	
	Savaran Granth & Arr	55.58	1.5	28	80	100	
I rest wit weighed (unit fruit)	Britania UK Orowith & Ass	11.58	1.0	471.17	Ar.	Yes.	
Clear al survive.	where an Mid cap A	11.09	1.5	32.57	80	786	
Cite of times Justities Importities	Kaman Othical Operty & Arr	51.26	1.5	516.87	80	Yas	

The second screenshot shows the equivalent filtering on the

Stats tab.

Filtering		Ranki	ng # Report Change title Availability Save i	as PDF Delete	Copy Send	Not shared	Convert to m	anual He
Features Sectors Condition	s Stats 🔳		Showing 1 to 11 of 11 fu	Fact	sheets	Graph	Options	
AP 6 years AP 7 years	>= ¥	^	Fund	Risk metrics: Alpha	Quartiles: Avg. quartile rank	Fund details: Years of data	Investment Trust: UK All Compenies	Financia Expres rating Crow
AP 8 years	>= 🗸		Aberdeen UK Tracker Trust Pic Ord 10P	-0.5	2.6	10	Yes	
1P 9 years	>= ¥		Artemia Alpha Trust plc	-0.55	2.7	10	Yes	
AP 10 years	>= V		Aurora Investment Trust plc	-0.23	3	10	Yes	
Annual Quartiles			Capital Gearing Trust plc	-0.32	2.8	10	Yes	
Quartile Yr 1	>= V		Invesco Perpetual Select UK Equity plc	0.56	1.0		Yes	
Quartile Yr 2	>= V	5	JP Norgan Mid Cap IT plc	1.2	2.4	10	Yes	
Duartile Yr 3	>= ¥ 2	5 1	Keystone IT Plc	0.28	2.1	10	Yes	
	>= V	- 1	Hanchester & London IT plc	-1.55	3.2	10	Yes	
Quartile Yr 4		- 1	Schroder UK Growth plc	-0.99	2.4	10	Yes	
Quartile Yr 5	>= ¥		The Mercantile Investment Trust Pic	0.22	2.2	10	Yes	
Best/worst			Threadneedle UK Select Trust	-0.04	2.3	10	Yes	
Best 12-months	>= 🗸							
Worst 12-months	>= 🗸							
Sain years	>= 🗸							
loss years	2. 1							

The fields on the Stats tab are obviously more flexible – for example, you can say that you want a quartile ranking of 2 or better, rather than just top-quartile performers. The fields on

the Features tab are simply intended for convenience and speed.

Finding funds within a grid.

If you are looking at a grid which contains lots of funds (e.g. hundreds of funds) and you want to find a specific fund within the grid, you can simply use the find functionality built into your web browser. Simply press **Ctrl+F**.