

Do I use the Fund Picker or research into linked funds?

Last Modified on 30/05/2017 1:37 pm BST

Firms who subscribe to both the product and fund modules of Synaptic Research have a choice: you can either use the Fund Picker as a quick and simple way of selecting the funds to recommend on a contract, or you can use the Fund Research link in order to conduct full fund research.

These two alternative links are highlighted in the screenshot below. (You can also start research into the linked funds on a contract from the home page.)

The screenshot shows the AXA Wealth Investment Bond (Adviser Charging) interface. At the top right, the AXA Wealth logo is displayed. Below it, the text "Investment Bond (Adviser Charging)" is shown. A navigation bar contains several links: "Linked funds on this contract", "Fund picker" (highlighted in red), "Save as PDF", "Fund research" (highlighted in red), "Contract", and "Help". Below the navigation bar, the "Provider and contract type:" section is visible, showing "Contract name: Investment Bond (Adviser Charging)", "Provider: AXA Wealth", and "Product type: Investment Bond, Unit Linked".

The "Select funds" section is also visible, showing a table of funds with columns for "GL: Absolute Return", "GL: Commodity & Energy", and "GL: Convertible". The table includes columns for "1yr", "3yr", "5yr", "10yr", "Vol.", "Alpha", "QScore", "Crown rating", "InChg", and "ANC".

	1yr	3yr	5yr	10yr	Vol.	Alpha	QScore	Crown rating	InChg	ANC
GL: Absolute Return										
<input type="checkbox"/> AXA Wealth BlackRock UK Absolute Alpha	7.96	4.76	2.07		1.38	0.31	18	1		1.20
<input type="checkbox"/> AXA Wealth Insight Absolute Equity Market Neutral	1.00	1.94	2.05		0.39	0.15	10	3		1.20
<input type="checkbox"/> AXA Wealth Standard Life Inv Global Absolute Return Strategies	1.77	3.86			0.86	0.17	28	3		1.25
<input type="checkbox"/> AXA Wealth Threadneedle Absolute Return Bond	0.33	0.22	0.31		0.94	-0.06	4	1		1.10
GL: Commodity & Energy										
<input type="checkbox"/> AXA Wealth BlackRock Gold & General	-25.58	-27.37	-18.55	-0.94	8.86	0.43	53	5		1.30
<input type="checkbox"/> AXA Wealth JPM Natural Resources	-44.57	-25.02	-18.64		5.94	-0.33	47	2		1.30
GL: Convertible										
<input type="checkbox"/> AXA Wealth Jupiter Global Convertibles	2.04	4.67			0.90	0.23	33	1		1.35
<input type="checkbox"/> AXA Wealth H&G Global Convertibles	2.65	5.34	4.04		1.70	0.10	17	1		1.20

In essence: the Fund Picker is a simple tool which stores your selected funds as part of the main research you are conducting.

The Fund Research link creates separate piece of research into the linked funds on the contract. You are then completing two pieces of research: one into the product type itself (such as ISAs or investment bonds), and one into the funds available on the contract you recommend in the first place