Can I manually exclude contracts?

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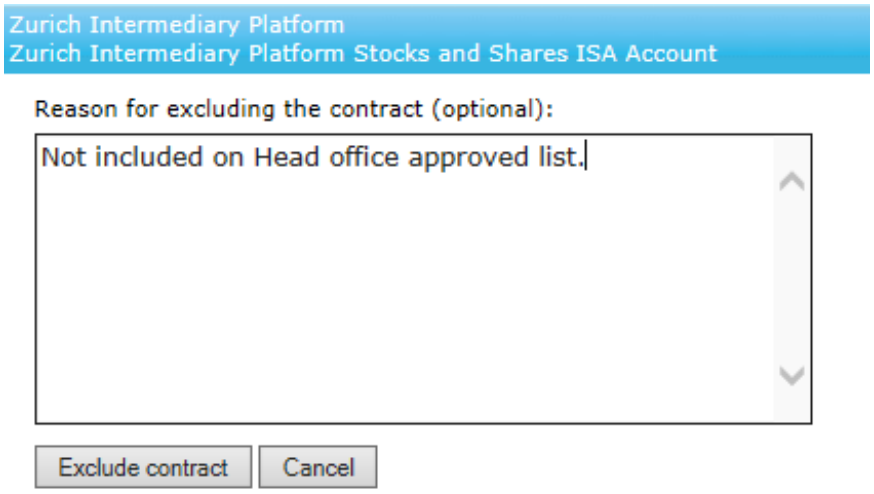
As well as (or instead of) filtering the grid of contracts, you can also manually select which contracts to include. This is particularly useful for comparing a specific set of contracts rather than the whole of market – e.g. product provider competitor analysis, multi-tie research etc.

N.B. Manual exclusion only applies to product research. It is not available on fund research.

You can specify the contracts to include/exclude in either of two ways:

Excluding individual contracts

You can remove an individual contract by clicking the right mouse button over the contract name in the grid, and choosing Exclude contract. This displays the pop-up window illustrated by the first screenshot.

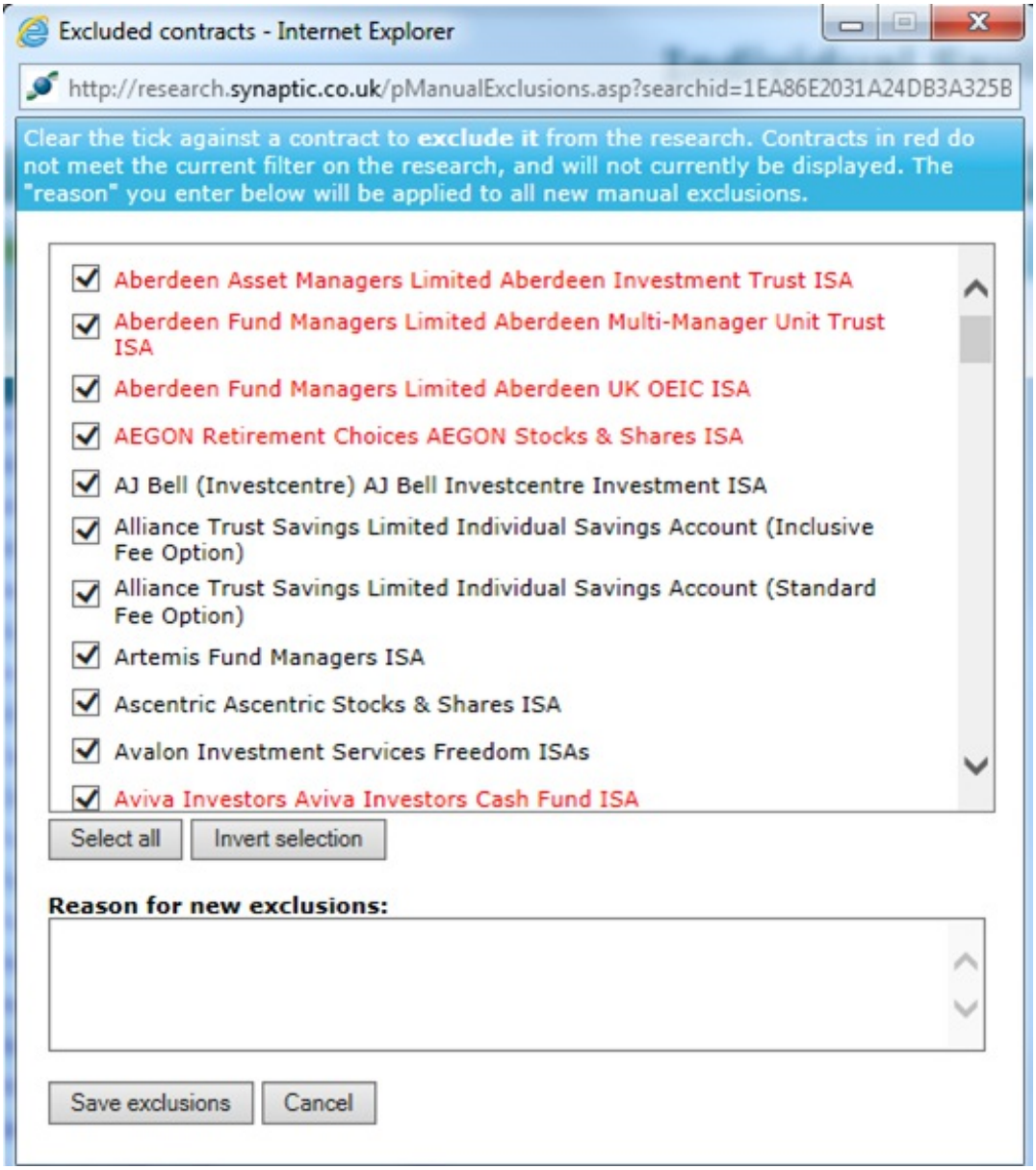


Optionally, you can enter text describing why the contract is being excluded. This reason is then included in any suitability reports or Quick Reports which you generate.

Excluding multiple contracts at once

You can exclude several contracts at once by clicking on the link at the top of the grid where it says “0 manually excluded”. This is highlighted in the screenshot below.

The system displays a pop-up window listing all the contracts, as illustrated by the second screenshot. You simply remove the ticks from any contracts which you don't want to include in your research. Again, you have the option of recording a reason for this which is then shown in suitability reports.



Contracts which are listed in red on this pop-up window are being excluded from the grid because of the conditions you are filtering on. Ticking these contracts in the pop-up exclusion screen will not cause them to be included in the grid until you remove whatever filtering conditions the contracts to not meet.

WARNING! – Once a contract has been manually excluded, it will remain excluded within that piece of research until it is re-included or until it is withdrawn by the product provider. If your reasons for the exclusion of the contract are in respect of its features, conditions, statistics, performance etc, you should be aware that even if the data changes, the contract will remain excluded. If manual exclusions have been used within **Preset Criteria**, we strongly recommend that manual exclusions are revisited periodically to ensure that the reasons for exclusion remain valid.