

Can I create a list of linked funds for a contract?

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A full contract factsheet, as described above, includes a section showing all the linked funds available on the contract.

However, this information can also be obtained in a more concise form on a separate screen – i.e. a screen which only shows the linked funds. In addition, this screen lets you tick one or more funds, and then generates a fund factsheet for each one.

This page is illustrated by the first screenshot. You simply tick the funds you want factsheets for, and then click on the **Show Factsheets** button at the top or bottom of the list.



The screenshot displays the 'Zurich Intermediary Platform' interface. At the top, it shows the logo for 'SYNAPTIC SOFTWARE' and the title 'Zurich Intermediary Platform Stocks and Shares ISA Account'. Below this, there is a navigation bar with options like 'Fund picker', 'Save as PDF', 'Fund research', 'Contract', and 'Help'. The main section is titled 'Linked funds on this contract' and includes a sub-section for 'Provider and contract type' with details for the contract name, provider, and product type. Below this is a 'Select funds' section with a table of funds. The table has columns for fund names, performance metrics (1yr, 3yr, 5yr, 10yr), Vol., Alpha, QScore, Crown rating, IntChg, and AMC. Each row has a checkbox for selection.

| GL:Absolute Return | 1yr | 3yr | 5yr | 10yr | Vol. | Alpha | QScore | Crown rating | IntChg | AMC |
|--|-------|------|------|------|------|-------|--------|--------------|--------|------|
| <input type="checkbox"/> Aberdeen UK Flexible Strategy B | 2.62 | 6.33 | 6.84 | | 1.14 | 0.55 | 48 | 3 | 0.00 | 0.75 |
| <input type="checkbox"/> Absolute Insight W | 0.80 | 2.93 | 3.17 | | 0.45 | 0.09 | 37 | 4 | 0.00 | 0.75 |
| <input type="checkbox"/> Artemis Pan-European Absolute Return I Hedged Acc GBP | 9.32 | | | | | | | | 1.00 | 0.75 |
| <input type="checkbox"/> Artemis US Absolute Return I Hedged Acc | | | | | | | | | 1.00 | 0.75 |
| <input type="checkbox"/> Aviva Inv Multi Strategy Target Income 2 | | | | | | | | | 0.00 | 0.75 |
| <input type="checkbox"/> Aviva Inv Multi Strategy Target Return 2 | 6.13 | | | | | | | | 0.00 | 0.75 |
| <input type="checkbox"/> BlackRock Absolute Return Bond D | -0.37 | 1.02 | | | 0.32 | | 1 | 2 | 0.00 | 0.50 |
| <input type="checkbox"/> BlackRock Dynamic Return Strategy D | | | | | | | | | 0.00 | 0.80 |
| <input type="checkbox"/> BlackRock UK Absolute Alpha D Acc | 8.04 | 5.14 | 2.49 | | 1.42 | 0.13 | 29 | 1 | 0.00 | 0.75 |
| <input type="checkbox"/> BlackRock UK Absolute Alpha S Acc | | | | | | | | 1 | 5.00 | 0.67 |
| <input type="checkbox"/> BlackRock UK Absolute Alpha S Inc | | | | | | | | 1 | 5.00 | 0.67 |
| <input type="checkbox"/> CF Canlife Strategic Return C Acc | -1.13 | | | | | | | | 4.75 | 0.75 |

This page can be opened in two ways:

- By right-clicking on a contract name in a research grid, and choosing the Linked Funds option from the pop-up menu.
- By choosing the Fund Factsheets option from a full contract factsheet.

Sorting the list of funds

The list of funds can be sorted by clicking on the column headers such as 1yr, Alpha etc. This sorts the funds within every sector, and highlights the column header in bold.

An example of this sorting is illustrated by the screenshot below. As a result of clicking on the **Alpha** header, all the sectors have been sorted so that the funds within them are displayed with the highest alpha values first.

Zurich Intermediary Platform
Zurich Intermediary Platform Stocks and Shares ISA Account

Linked funds on this contract | Fund picker | Save as PDF | Fund research | Contract | Help

Provider and contract type:

Contract name: Zurich Intermediary Platform Stocks and Shares ISA Account
 Provider: Zurich Intermediary Platform
 Product type: Individual Savings Accounts, ISA

Select funds | Show factsheets | Graph | Select all | Invert selection | Clear all | Show all | FE Global Sectors

| GL:Absolute Return | 1yr | 3yr | 5yr | 10yr | Vol. | Alpha | QScore | Crown rating | InitChg | AMC |
|--|-------|-------|------|------|------|--------------|--------|--------------|---------|------|
| <input type="checkbox"/> FP Argonaut Absolute Return R Acc GBP | 23.59 | 22.11 | | | 2.80 | 0.92 | 69 | 4 | 0.00 | 0.75 |
| <input type="checkbox"/> RWC US Absolute Alpha B GBP | 8.31 | 9.04 | 7.56 | | 1.82 | 0.70 | 66 | 5 | 5.00 | 1.00 |
| <input type="checkbox"/> Old Mutual Global Equity Absolute Return R Hedged Acc GBP | 6.55 | 8.48 | 9.22 | | 1.58 | 0.64 | 77 | | 0.00 | 0.75 |
| <input type="checkbox"/> RWC US Absolute Alpha A GBP | 7.82 | 8.22 | 6.74 | | 1.86 | 0.64 | 58 | 5 | 5.00 | 2.00 |
| <input type="checkbox"/> Aberdeen UK Flexible Strategy B | 2.62 | 6.33 | 6.84 | | 1.14 | 0.55 | 48 | 3 | 0.00 | 0.75 |
| <input type="checkbox"/> RWC Europe Absolute Alpha B GBP | -1.33 | 7.44 | 5.53 | | 1.54 | 0.54 | 49 | 5 | 5.00 | 1.00 |
| <input type="checkbox"/> RWC Global Innovation Absolute Alpha B GBP | 8.16 | 6.32 | 6.54 | | 1.83 | 0.51 | 75 | 4 | 5.00 | 1.00 |
| <input type="checkbox"/> RWC Global Innovation Absolute Alpha A GBP | 7.52 | 5.51 | 5.65 | | 1.86 | 0.44 | 67 | 4 | 5.00 | 2.00 |
| <input type="checkbox"/> Henderson European Absolute Return I Acc | 4.72 | 12.82 | 8.36 | | 1.47 | 0.39 | 29 | 5 | 5.00 | 0.75 |
| <input type="checkbox"/> Henderson UK Absolute Return I Acc | 6.40 | 9.87 | 6.59 | | 1.10 | 0.27 | 41 | 5 | 5.00 | 1.00 |
| <input type="checkbox"/> Kames UK Equity Absolute Return B Acc | 2.66 | 4.05 | 3.58 | | 0.63 | 0.22 | 25 | 4 | 0.00 | 0.80 |
| <input type="checkbox"/> RWC Core Plus B GBP | 2.68 | 1.92 | 1.14 | | 0.61 | 0.16 | 20 | 3 | 5.00 | 0.70 |

(Sorting on volatility shows the funds with lowest values first, because lower numbers are better for these metrics.)

Generating factsheets and graphs

The tickboxes next to each name let you select multiple funds to graph or display factsheets for. You simply tick the funds you want, and then click on the **Factsheets** button or the **Graph** button.

(Please note that firms which have not subscribed to the fund module of Synaptic Research only have access to one type of graph.)

Fund picker

As well as sorting, you can also use a “fund picker” which does three things:

- Highlights the specific sectors in which you are recommending funds (and hides the other sectors).
- Sorts the remaining sectors on your choice of metric such as alpha, volatility or

past performance.

- Automatically selects the best fund in each sector.

This fund picker is described in the next section. It is designed as a quick and simple tool for selecting the funds to use on a contract.

The Fund Research link

If your firm subscribes to the fund module of Synaptic Research, the menu bar will also include a link labelled **Fund Research**. This is highlighted in the screenshot below.

The screenshot shows the Zurich Intermediary Platform interface. At the top, there is a logo for Synaptic Software and the title "Zurich Intermediary Platform Zurich Intermediary Platform Stocks and Shares ISA Account". Below this is a navigation bar with links for "Fund picker", "Save as PDF", "Fund research" (highlighted with a red circle), "Contract", and "Help".

Below the navigation bar, there is a section titled "Provider and contract type:" with the following details:

- Contract name: Zurich Intermediary Platform Stocks and Shares ISA Account
- Provider: Zurich Intermediary Platform
- Product type: Individual Savings Accounts, ISA

Below this, there is a "Select funds" section with a table of funds. The table has columns for "GL: Absolute Return", "1yr", "3yr", "5yr", "10yr", "Vol.", "Alpha", "QScore", "Crown rating", "InChg", and "AMC". The funds listed are:

| GL: Absolute Return | 1yr | 3yr | 5yr | 10yr | Vol. | Alpha | QScore | Crown rating | InChg | AMC |
|--|-------|-------|------|------|------|-------|--------|--------------|-------|------|
| <input type="checkbox"/> FP Argonaut Absolute Return R Acc GBP | 23.59 | 22.11 | | | 2.80 | 0.92 | 69 | 4 | 0.00 | 0.75 |
| <input type="checkbox"/> RWC US Absolute Alpha B GBP | 8.31 | 9.04 | 7.56 | | 1.82 | 0.70 | 66 | 5 | 5.00 | 1.00 |
| <input type="checkbox"/> Old Mutual Global Equity Absolute Return R Hedged Acc GBP | 6.55 | 8.48 | 9.22 | | 1.58 | 0.64 | 77 | | 0.00 | 0.75 |
| <input type="checkbox"/> RWC US Absolute Alpha A GBP | 7.82 | 8.22 | 6.74 | | 1.86 | 0.64 | 58 | 5 | 5.00 | 2.00 |
| <input type="checkbox"/> Aberdeen UK Flexible Strategy B | 2.62 | 6.33 | 6.84 | | 1.14 | 0.55 | 48 | 3 | 0.00 | 0.75 |
| <input type="checkbox"/> RWC Europe Absolute Alpha B GBP | -1.33 | 7.44 | 5.53 | | 1.54 | 0.54 | 49 | 5 | 5.00 | 1.00 |
| <input type="checkbox"/> RWC Global Innovation Absolute Alpha B GBP | 8.16 | 6.32 | 6.54 | | 1.83 | 0.51 | 75 | 4 | 5.00 | 1.00 |
| <input type="checkbox"/> RWC Global Innovation Absolute Alpha A GBP | 7.52 | 5.51 | 5.65 | | 1.86 | 0.44 | 67 | 4 | 5.00 | 2.00 |
| <input type="checkbox"/> Henderson European Absolute Return I Acc | 4.72 | 12.82 | 8.36 | | 1.47 | 0.39 | 29 | 5 | 5.00 | 0.75 |
| <input type="checkbox"/> Henderson UK Absolute Return I Acc | 6.40 | 9.87 | 6.59 | | 1.10 | 0.27 | 41 | 5 | 5.00 | 1.00 |
| <input type="checkbox"/> Kames UK Equity Absolute Return B Acc | 2.66 | -4.05 | 3.58 | | 0.63 | 0.22 | 25 | 4 | 0.00 | 0.80 |
| <input type="checkbox"/> RWC Core Plus B GBP | 2.68 | 1.92 | 1.14 | | 0.61 | 0.16 | 20 | 3 | 5.00 | 0.70 |

This tool lets you start in-depth fund research into the linked funds available on the contract. It is a more comprehensive alternative to the Fund Picker for occasions when you need to take complex factors into account when picking the funds to recommend. This topic is covered below.