

Grid of contracts

Last Modified on 14/06/2017 10:43 am BST

This screen is the heart of Synaptic Research. On the right-hand side it starts by showing all the contracts for the type of product being researched. On the left it shows all the fields of data which Synaptic collects about those contracts, divided up into tabbed groups.

The first screenshot shows a list of all unit-linked investment bonds, and the five tabbed categories of field which Synaptic collects about bonds.

Investment Bond
Unit Linked

Filtering | Ranking | Report | Quote | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

14 contracts out of 20 (70%) - 0 manually excluded

Company	Contract
Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option
AXA Wealth	Investment Bond (Adviser Charging)
Canada Life	CanInvest Select Account
Legal & General	Select Portfolio Bond
MetLife Services Ltd	MetLife Investment Bond
Old Mutual Wealth	Collective Investment Bond
Prudential Intermediary Division	Prudence Inheritance Bond
Prudential Intermediary Division	Prudential Investment Plan (PIP)
Prudential Intermediary Division	Prudential Onshore Portfolio Bond
Scottish Widows	Investment Bond - Initial charge option
Scottish Widows	Investment Bond - Withdrawal charge option
Standard Life Assurance Ltd	Onshore Bond (Wrap)
Standard Life Assurance Ltd	Tailored Investment Bond
Sterling Assurance	Sterling Investment Bond

Clear all filters | Audit trail | Import filter

For financial advisers, the main purpose of this screen is to filter out contracts which do not meet the client's requirements – e.g. contracts which don't offer essential features, or whose charges are uncompetitive, or which cannot implement the portfolio needed for the client's asset allocation requirements, or whose past performance is poor. The second screenshot shows filtering on investment bonds which offer phased investment, segmentation, and a loyalty bonus.

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Features | Sectors | Conditions | Stats | PP

5 contracts out of 20 (25%) - 0 manually excluded Options

Company	Contract
AXA Wealth	Investment Bond (Adviser Charging)
Canada Life	CanInvest Select Account
Standard Life Assurance Ltd	Onshore Bond (Wrap)
Standard Life Assurance Ltd	Tailored Investment Bond
Sterling Assurance	Sterling Investment Bond

Joint life last survivor
 Extra life cover available
 Life of another
 Death benefit
 Phased investment facility
 Split investment (UL/UWP)
 Segmentation
 Loyalty bonus
 Withdrawal options
 Withdrawal frequency
 Partial surrender no penalty
 Full surrender no penalty

Filtering is a powerful area of the software, and is covered in the next article. However, the grid of contracts can also be used for a number of other purposes. Each of these is discussed briefly in this Getting Started section, and in full detail in the User Guide.

For example:

- Adding columns to the grid of contracts
- View contract factsheets and lists of linked funds
- Manually selecting the contracts to research