

# Ranking contracts

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The filtering process above describes how to research a product type, and eliminate any contracts which do not meet a client's requirements. At the end of that stage the whole-of-market is reduced to those contracts which are capable of fulfilling the client's needs.

The next stage is to take the remaining contracts and rank them in order of preference. You click on the **Ranking** command above the grid of contracts, and the system displays the ranking screen illustrated by the first screenshot.

The screenshot shows the 'Ranking' interface for Individual Savings Accounts (ISA). The interface is divided into two main sections. On the left, a sidebar titled 'Ranking' contains a list of categories: 'Fund link stats', 'Desirable features', and 'Past performance'. The 'Fund link stats' category is selected. On the right, the 'Fund link stats' section displays a table with columns for 'Fund link stats' and 'Importance' (Low, Med, High). The table lists 'Linked funds' and 'Linked sectors', each with three checkboxes corresponding to the importance levels. A 'Clear group' button is located at the top right of the table area. The top of the interface shows the 'Individual Savings Accounts' title and 'ISA' sub-title, along with navigation links for 'Calculate', 'Back to filtering', and 'Help'.

This shows a list of different categories of ranking criteria down the left, and each item within a category on the right. You simply click on the category name to move from category to category. For a contract such as an investment bond, the categories include financial strength, past performance, projected surrender values (based on the contracts' charges), and desirable contract features.

You can pick up to 15 items to rank on (more if you use the Mozilla Firefox browser). For each item you either do nothing – i.e. ignore it– or mark it as being of Low, Medium or High importance. The second screenshot illustrates a ranking scheme with a number of different items selected.

Ranking Calculate | Back to filtering | Help

Choose a group below, and then choose one or more fields to rank on.

- Fund link stats
- Desirable features
- Past performance

Calculate | Clear all ranking

**Fund link stats** Clear group

Each field you select on this list is treated as a separate ranking item. Click on an item's name for a description of it.

You only need to tick the items you want to rank on. Any items which you consider irrelevant can simply be left blank.

Fund link stats	Importance		
	Low	Med	High
Linked funds	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Linked sectors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The third screenshot shows an example of a league table, with one tab for the total scores, and a separate tab showing the results for each individual ranking item which was selected. The ranking results can be saved in PDF form for future reference.

Ranking results Report | Save as PDF | Back to ranking | Back to filtering | Help

Total score	Desirability	Linked funds	Linked sectors
1 AXA Elevate	Elevate Stocks & Shares ISA - Exploit	30.0 pts	86%
2 Avalon Investment Services	Freedom ISAs	29.0 pts	83%
3 Seven Investment Management	ISA (Stocks and Shares)	25.0 pts	71%
4 Zurich Intermediary Platform	Zurich Intermediary Platform Stocks and Shares ISA Account	22.5 pts	64%
5 Standard Life Assurance Ltd	Wrap ISA	9.0 pts	26%

**N.B.** The sectors which are available as ranking items depend on the sectors which you filtered on in the previous stage. If you don't filter on any sectors, then you will not be able to rank on sector past performance.