

How do I filter on statistics within Product research?

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The **Stats** tab lists a variety of statistics about contracts: financial strength, investment flexibility in terms of linked funds and sectors, plus own-charge and premium information about contracts (depending on the type of product). Examples of the latter include projected maturity and surrender values.

For each field you can enter a value, and choose whether to filter on equal to that exact value (=), at least that value (>=), or at most that value (<=).

In the example illustrated by the first screenshot below the list is being filtered so that it only includes contracts with an AKG financial strength rating of at least 4.

The screenshot shows the Synaptic Product Research interface. The top navigation bar includes 'Filtering', 'Ranking', 'Report', 'Quote', 'Comparison', 'Change title', 'Save as PDF', 'Delete', 'Copy', 'Send', 'Not shared', and 'Help'. The main interface is divided into a left sidebar and a right main area. The sidebar has tabs for 'Features', 'Sectors', 'Conditions', 'Stats', and 'PP'. The 'Stats' tab is active, showing filters for 'AKG Unit Linked Business' (set to 4), 'Moody's rating', 'Fund link statistics' (Linked funds and Linked sectors), and 'Surrender Values' (£10k Contribution after 1, 3, 5, and 10 years). The main area displays a table of 11 contracts out of 20 (55%), with 0 manually excluded. The table has columns for 'Company', 'Contract', and 'AKG Unit Linked Business'.

Company	Contract	AKG Unit Linked Business
Aviva Life & Pensions UK Limited	Select Investment Growth & Income Option	5
AXA Wealth	Investment Bond (Adviser Charging)	5
Canada Life	CanInvest Select Account	4
Legal & General	Select Portfolio Bond	5
Prudential Intermediary Division	Prudence Inheritance Bond	5
Prudential Intermediary Division	Prudential Investment Plan (PIP)	5
Scottish Widows	Investment Bond - Initial charge option	4
Scottish Widows	Investment Bond - Withdrawal charge option	4
Standard Life Assurance Ltd	Onshore Bond (Wrap)	5
Standard Life Assurance Ltd	Tailored Investment Bond	5
Sterling Assurance	Sterling Investment Bond	5

When performing research into some products (mostly price-led contracts such as term assurance, CIC etc.), Synaptic provides the valuable option of retrieving live quotations so that you can perform research using features AND pricing at the same time. The data items are added to the grid, but they are also shown on the Stats tab, so that filtering can be applied.

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

Quote ref: 53833696 quoted on 02/11/2015 at 17:11 - change quote/client options

Features Conditions **Stats**

AKG Non Profit Strength

Moody's rating

Live quotes

Live Quote Premium

Live Quote Benefit

Interest rate (%) - if applicable

Clear all filters Audit trail Import filter

33 contracts out of 41 (80%) - 8 manually excluded

Company	Contract	Recommend contract	Live Quote Premium £	Live Quote Benefit £	AKG Non Profit Strength
AEGON	Business Protection				4
AEGON	Relevant Life				4
AG Life Limited	Relevant Life Insurance				4
AG Life Limited	YourLife Plan	SELECT	14.17	100000.00	4
Aviva Life & Pensions	Life Insurance Options				5
Bright Grey	Lifestyle Plus Protection Plan	SELECT	18.84	100000.00	4
Bright Grey	Personal Protection Menu	SELECT	17.88	100000.00	4
Expatriate Healthcare	Expatriate Healthcare - Term Life As				
Friends Life Individual	Protect + Level Term Assurance	SELECT	16.34	100000.00	5 sort
Legal & General	Multi Protection				5
Legal & General	The Term Assurance Plan	SELECT	13.69	100000.00	5
Lutine Assurance	Level Term Assurance [policy term o				
LV=	Flexible Protection Plan - Business Pr				4
LV=	Flexible Protection Plan - Life Protect	SELECT	14.26	100000.00	4
Old Mutual Wealth	Protect - fixed Term	SELECT	16.11	100000.00	4
Partnership Assurance	Level Term Assurance				4
PULSE	Level Term Assurance				
Scottish Provident	Self Assurance Term-Business				4
Scottish Provident	Self Assurance Term-Personal	SELECT	13.26	100000.00	4
VitalityLife	Mortgage Plus Plan				5
VitalityLife	VitalityLife	SELECT	15.03	100000.00	5
VitalityLife	VitalityLife Essentials Plan	SELECT	13.73	100000.00	5
Zurich Assurance Ltd	Level Protection Plan - guaranteed p	SELECT	13.20	100000.00	4