

Can I filter on specific linked funds?

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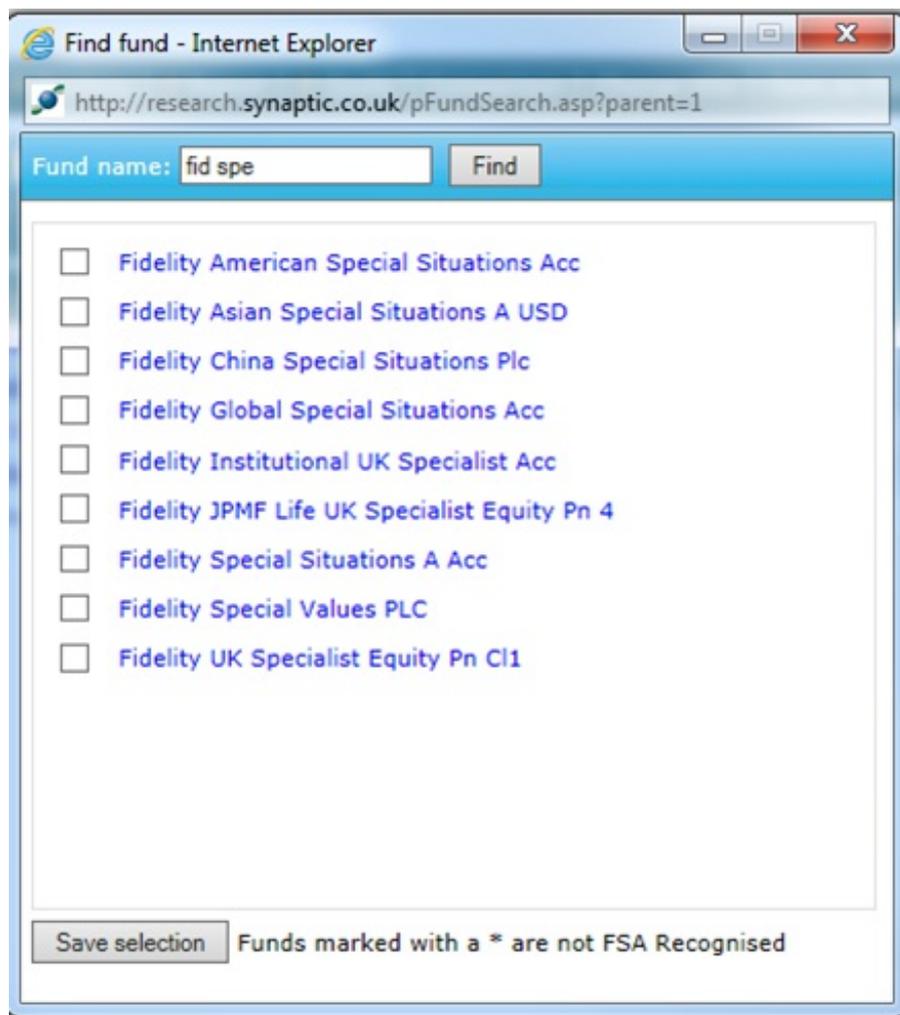
As well as – or instead of – filtering on sectors, you can also eliminate contracts which do not offer specific linked funds. The functionality for doing this is at the bottom of the sectors list.

The screenshot shows the Ben Reynolds Investment Bond, Unit Linked software 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 'Features', 'Sectors', 'Conditions', 'Stats', and 'PF'. The 'Sectors' tab is active, showing a list of sectors with checkboxes. The 'Life Funds' column in the table below is highlighted in green, indicating that the selected funds are included in the results.

| Company | Contract | Life Funds: ABI UK All Companies |
|-----------------------------|------------------------------------|----------------------------------|
| AXA Wealth | Investment Bond (Adviser Charging) | Yes |
| Canada Life | CanInvest Select Account | Yes |
| Legal & General | Select Portfolio Bond | Yes |
| Standard Life Assurance Ltd | Tailored Investment Bond | Yes |
| Sterling Assurance | Sterling Investment Bond | Yes |

In the first screenshot, contracts are being eliminated unless they offer either of Fidelity’s American or UK special situations funds. Changing the drop-down field from “any” to “all” would eliminate contracts unless they offered both funds (rather than either fund).

Funds can be added to this list by clicking on the link at the bottom of the list of sectors. This displays a pop-up box for searching for funds, as illustrated by the second screenshot. Once you have found matching funds, you can either select a single one by clicking on its name, or multiple funds by ticking the boxes next to them and then clicking on the **Save selection** button.



Once you have added funds to the filtering list (as in the first screenshot), you can remove them again simply by clicking on their names.

Importing funds from a manual list

If you subscribe to the fund module of Synaptic Research, there is an additional option. This is highlighted in the screenshot below (and is not displayed if you only subscribe to the Product module).

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

Features | Sectors | Conditions | Stats | PP

12 contracts out of 20 (60%) - 0 manually excluded

| Company | Contract | Life Funds: All UK All Companies |
|----------------------------------|--|--|
| Aviva Life & Pensions UK Limited | Select Investment Growth & Income Option | Yes |
| AXA Wealth | Investment Bond (Adviser Charging) | Yes |
| Canada Life | CanInvest Select Account | Yes |
| Legal & General | Select Portfolio Bond | Yes |
| Prudential Intermediary Division | Prudence Inheritance Bond | Yes |
| Prudential Intermediary Division | Prudential Investment Plan (PIP) | Yes |
| Sarlam | Versatile Investment Portfolio | Yes |
| Scottish Widows | Investment Bond - Initial charge option | Yes |
| Scottish Widows | Investment Bond - Withdrawal charge option | Yes |
| Standard Life Assurance Ltd | Onshore Bond (Wrap) | Yes |
| Standard Life Assurance Ltd | Tailored Investment Bond | Yes |
| Sterling Assurance | Sterling Investment Bond | Yes |

Contracts must include a link to **all** of the following funds.
(No specific funds required. [Click here](#) to add a fund, or [import from a manual fund list](#).)

Clear all filters | Audit trail | Import a list of funds from a manual fund list

You can import the funds you want to filter on from an existing manual fund list. In this instance, the manual fund list acts like a list of “favourites”. You can set up the manual list once, and then use it in filtering any number of pieces of product research.

Very simply, Synaptic Research reads all the funds on the manual fund list, and then filters your product research based on whether each contract offers all of those funds.