

How do I create a comparison report?

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The Comparison link on the menu bar of the filtering page shows every single field about the contracts remaining in the research grid. For example, it can be used to generate complete comparisons of a specific group of contracts (e.g. competitor analysis for product providers): you manually exclude all contracts other than the ones you are interested in, and then click on the **Comparison** tool.

N.B. The comparison tool only applies to product research. It is not available on fund research.

The Comparison tool vs. the Field Chooser

The Comparison tool is much faster than using the Field Chooser to add every single possible field to the main research grid. However, the extra speed does come at the cost of a couple of disadvantages:

- The comparison report is view-only, and cannot be filtered, sorted etc.
- The comparison report is only designed to display a relatively small number of contracts. The system will warn you if you try to include more than 10 contracts, and will simply not let you include more than 30.

The Comparison report screen

The screenshot below shows the result of clicking on the **Comparison** tool. The contracts are displayed in columns, and all the fields of data are displayed in grouped rows down the side. Long-text fields are shown separately at the bottom of the Comparison.

Comparison grid						
Save as PDF Back to filtering Help						
Choose the information to display						
<input checked="" type="checkbox"/> Features <input checked="" type="checkbox"/> Conditions <input checked="" type="checkbox"/> Financial strength <input type="checkbox"/> Stats <input type="checkbox"/> Notes						
Company	Aviva Life & Pensions UK Limited	AXA Wealth	Canada Life	HSBC Life (UK) Ltd	Legal & General	
Contract	Select Investment Growth & Income Option	Investment Bond (Adviser Charging)	CanInvest Select Account	HSBC Onshore Investment Bond (Select 0.35)	Select Portfolio Bond	
Features						
Discounted gift bond	No	No	No	Yes	Yes	
Discounted gift friendly	Yes	Yes	No	Yes	Yes	
Single life	Yes	Yes	Yes	Yes	Yes	
Extra life cover available	No	No	No	No	Yes	
Life of another	Yes	Yes	Yes	Yes	Yes	
Death benefit	Yes	Yes	Yes	Yes	Yes	
Greater than bid value	Yes	Yes	Yes	Yes	Yes	
Original investment (minus withdrawals) if greater than bid value	No	No	No	No	No	
Phased investment facility	No	Yes	Yes	Yes	No	
Split investment (UL/UWP)	Yes	No	No	No	No	
Segmentation	Yes	Yes	Yes	Yes	Yes	
Loyalty bonus	No	Yes	Yes	No	No	
Withdrawal options	Yes	Yes	Yes	Yes	Yes	
Penalty free withdrawal allowance	Yes	Yes	Yes	Yes	Yes	
Guaranteed income return	No	No	No	No	No	
Withdrawal frequency	Yes	Yes	Yes	Yes	Yes	
Monthly	Yes	Yes	Yes	Yes	Yes	
Quarterly	Yes	Yes	Yes	Yes	Yes	
Termly income	Yes	No	Yes	Yes	No	

You can control which sections of the report are included using the bar at the top of the screen. You simply add or remove ticks against the sections you want.

Once you have decided on the sections you want, you can then print the report (using your browser's print option), save it in PDF form, or export it to Microsoft Excel (if your firm has purchased the optional Export functionality).