

How do I filter on Statistics?

Last Modified on 02/06/2017 12:35 pm BST

The **Stats** tab lists a variety of statistics about contracts - financial strength, investment flexibility in terms of linked funds and sectors, plus charges and premium information about contracts (all dependent on the type of product). For example it may 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' (=), 'less than or equal to that value' (>=) or 'more than or equal to that value' (<=):

Features	Sectors	Conditions	Stats	PP	
AKG Unit Linked Business			>=	3	
Moody's rating			>=		
Fund link statistics					
Linked funds			>=		
Linked sectors			>=		
Maturity Values					
Age 30, retiring at 55, £10k			>=		
Age 40, retiring at 55, £10k			>=		
Age 50, retiring at 55, £10k			>=		
Age 30, retiring at 60, £10k			>=		
Age 40, retiring at 60, £10k			>=		
Age 50, retiring at 60, £10k			>=		
Age 30, retiring at 65, £10k			>=	70000	
Age 40, retiring at 65, £10k			>=		
Age 50, retiring at 65, £10k			>=		
Age 60, retiring at 65, £10k			>=		
Age 30, retiring at 70, £10k			>=		
Age 40, retiring at 70, £10k			>=		

Clear all filters Audit trail Import filter

In the example above, the list of contracts has been filtered on AKG financial strength rating of at least 3 and a projected maturity value of at least £70,000 for a £10,000 lump

sum contribution retiring at 65.

You may find it useful when using **Stats** to filter on to add the column into the grid and view the different results for each of the products. This might help to give you an idea of what result you should be searching on.
