## Comparison & Ex-Ante -Research Screen

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In the example below, we have added a **Self Investment Personal Pension** as an investment. If you are unsure of how to add investments, see article Comparison with Ex-Ante - Add Investment for details.

Synaptic Pathways Home Contacts V Research	Q Search	Configuration Fund Lists 🗸 Knowledge Base 1	Vly Apps & Settings Valuations	** 🖩 🎕 ? 🌣 🖡 🐻
Research Test Illustration Apr22	1917, es (11547, XVIIIX, 70007,	The second of the second s	444-911 (- <i>7719-</i> 75111377-388887700)	Convert to Holding
Client Description Illustration Type Client Test Description Text Whole of Market	Segment Name			
Research	Review	Client Check-In	Repo	✓ Mark Status as Complete
Investments Switches/Trades Fees	Term 10 C* Update Re	Change Segment	Stakeholder Pension Exclude Adviser Fee	s 3 Significant Figures
Self Invested Personal	Filter Results by Provider Filter one or more providers	Filter Results by Product Filter one or more produ	cts 🔻	Sort Results by Value Growth % Final Value £ Charges £ RLV %
Investment Amount Risk Category	✓ Platforms			32 of 32 Results
Trope Fund Royal London UK All Share Tracker Z Acc	7iM SIPP	estment Management	Growth Final Value 4.94% £359,942.28	Total Fees RJY £1,834.91 0.06%
Synaptic	7iM Seven Inv Modular is	estment Management jpp	Growth Final Value 4.87% £357.697.51	Total Fees 8.1.V 64.079.67 0.13%
	7iM Seven Inv AJ Bell Inv	estment Management estcentre SIPP	Growth Final Value 4.84% £356,461.74	Total Ress RJY 45315.45 0.16%
	D PLATFORM P1 Investo	nent Management -	Growth Final Value	Total Fees RLY +

Multiple investments can be added through the **Add Investment +** button.

As you add investments, the list of platforms will update to display investments available. At the bottom of the page there will be a platform & off platform combination.

In the example below, we have added **Self Invested Personal Pension** and **Individual Savings Account**. The platforms listed show the SIPP and ISA included:

Research	Review		Client Check-In		Report			Mark Status as Complete
Investments Switches/Trades Fees	Term 10 C*	Update Results	Change Segment	Stakeholder Pension	Exclude Adviser Fees	3 Significa	nt Figures	Report
Add Investment •  Self Invested Personal  Pension  Edit	Filter Results by Provider Filter one or more providers	v	Filter Results by Product Filter one or more pro	ducts	¥	Sort Results by Va Growth %	ue Final Value £	Charges £ RLY %
Investment Anount Risk Category £227,787.27 Moderately Cautio Target Fund Royal London UK All Share Tracker Z Acc	7iM	Seven Investment Management 7IM SIPP - ISA (Stocks and Shares)		Growth <b>4.90%</b>	Final Value £421,714.00	Total Fees £3,665.84	RJ.Y 0.10%	+
Individual Savings Accounts	7İM	Seven Investment Management Modular iSIPP + ISA (Stocks and Sha	res)	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
Tarpet Fund Royal London UK All Share Tracker Z Acc	7İM	Seven Investment Management AJ Bell Investcentre SIPP + ISA (Stock	is and Shares)	Growth 4.80%	Final Value £418,181.31	Total Fees £7,198.53	R.I.Y 0.20%	+
Synaptic	PLATFORM	P1 Investment Management The P1 SIPP • P1 ISA		Growth 4.76%	Final Value £416,601.28	Total Fees £8,778.56	RJ.Y 0.24%	+

**Lowest R.I.Y Platform and Off Platform Combination** will be displayed at the bottom of the list:

✓ Lowest R.I.Y Platform and Off Platform Combination					1 of 1 Results	
Combination	Embark • AJ Bell (Investcentre)	Growth 4.53%	Final Value £387,028.36	Total Fees £9,374.83	R.I.Y 0.27%	+
embark>	<b>Embark</b> Embark ISA	Growth 4.69%	Final Value £38,679.80	Total Fees £857.96	RLY 0.31%	
Magneticentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP	Growth 4.74%	Final Value £348,348.57	Total Fees £8,516.87	R.I.Y 0.26%	

Growth, Final Value, Total Fees and R.I.Y are displayed next to each result:

✓ Platforms						22 of 22 Results
≫ <sup>AJBell</sup> Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP • AJ Bell Investcentre Investment ISA	Growth 4.63%	Final Value £383,508.60	Total Fees £12,894.59	R.I.Y 0.37%	+
	James Hay Partnership Modular iSIPP • Modular Stocks & Shares ISA	Growth 4.58%	Final Value £381,913.88	Total Fees £14,489.31	R.I.Y <b>0.42%</b>	+
FundsNetwork	FundsNetwork FundsNetwork Personal Pension • FundsNetwork (No Investor Fee)	Growth 4.58%	Final Value £381,814.36	Total Fees £14,588.83	R.L.Y 0.42%	+
<b>EGON</b>	Aegon Platform Cofunds Pension Account • Aegon ISA	Growth 4.56%	Final Value £381,313.28	Total Fees £15,089.91	R.L.Y <b>0.44%</b>	+