

Comparison & Ex-Ante using a CIP - Creating in the research tab

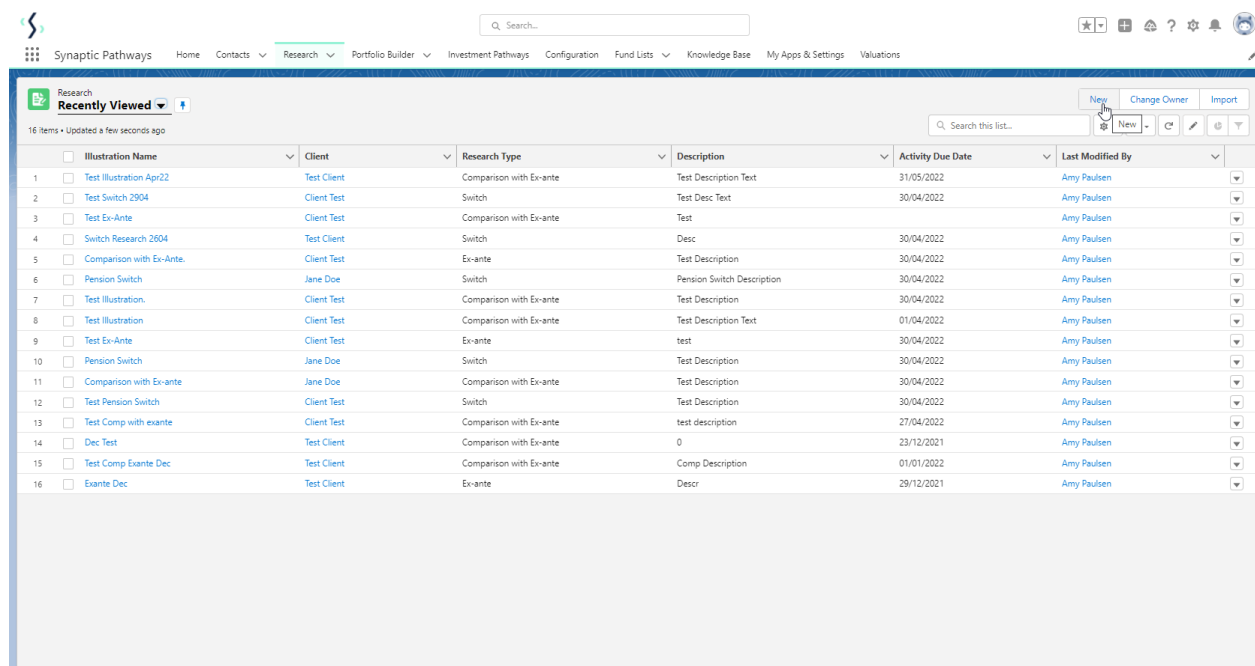
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Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create a comparison with ex-ante scenario in the Research tab, click into the tab from the Homepage:



All existing research will be listed. Click **New** to create new research:



If you would like to run a comparison with an ex-ante report, select the first option. If you wish to

create an ex-ante report without the comparison, select the second option:

New Research

Select a record type

- Comparison with Ex-ante
Select this option to compare platforms and products BEFORE executing an Illustration as a single or multiple wrapper report
- Ex-ante (Pre-Sales)
Select this option to create an Ex-ante (pre-sales) illustration for a single product
- Switch
Select this option to consolidate one or more existing policies (ceding schemes) to a new single scheme.

Cancel Next

As we have created research within the Research tab, you will need to search for the client:

New Research: Comparison with Ex-ante

Information

*Client

Search Contacts...

Recent Contacts

- Jane Doe
- Test Client
- Client Test
- Steve Test
- Chris Smith
- + New Contact

Cancel Save & New Save

Note - Client field will already be completed if research is created directly in the contact record.

Complete the remaining fields:

al advisers, paraplanners, compliance and administration staff, part of the Synaptic Pathways research and

Ms. Test

New Research: Comparison with Ex-ante

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

Cancel Save & New Save

Save:

New Research: Comparison with Ex-ante

Information

* Client

* Illustration Name

* Term

Description

Activity Due Date

Cancel Save & New Save

Search...

Investment Pathways Configuration Fund Lists Knowledge Base My Apps & Settings

✓ Research "Test Illustration CIP" was created. ✕

As we have configured a Central Investment Strategy, we will need to choose whether we use a segment or conduct Whole of Market research:

Please note - If the whole of market button cannot be enabled, you do not have the permissions to overwrite the segment/s assigned to you in the CIP. Your Administrator can assign this for you. Article **Pathways Administrator - Assigning Whole of Market permissions** explains how this is applied to your account.

Choose

Select a segment from the list to use as the basis for this illustration OR enable Whole of Market 'mode' to select from all available products and funds.

* Choose Segment

Select an Option ▼

Test Segment 1

Test Segment 2

Use Whole of Market Disabled

[Save](#)

Once the segment is selected, **Save**

This will take you directly into the research:

The screenshot shows the Synaptic Pathways Research interface. At the top, there is a navigation menu with options like Home, Contacts, Research, Portfolio Builder, Investment Pathways, Configuration, Fund Lists, Knowledge Base, My Apps & Settings, and Valuations. A search bar is also present. The main content area is titled 'Test Illustration CIP' and includes a 'Convert to Holding' button. Below this, there are tabs for 'Research', 'Review', 'Client Check-in', and 'Report'. The 'Research' tab is selected, and the 'Investments' section is active. This section contains an 'Add Investment +' button and a description: 'Add the investment details for a wrapper or choose from the available platforms or off platform products to create a comparison or illustration. Choose the segment, target risk category, funds and fees.' The background features a stylized illustration of a cactus and a sun. At the bottom, there is a section for 'Ex-ante Results' with the text 'Add or include investments to see comparison results.' and a 'Continue to Ex-ante Illustration' button.