

# Comparison & Ex-Ante using a CIP - Research Screen

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This article explains the Research screen in Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup a CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles [here](#).

In the example below, we have added a **Self Investment Personal Pension** as an investment. See article [Comparison with Ex-Ante using a CIP - Add Investment](#) for details on adding investments to your Research.

The screenshot shows the Synaptic Research interface. At the top, there's a navigation bar with 'Synaptic Pathways' and various menu items. Below that, a search bar and utility icons are visible. The main area is titled 'Research Test Illustration CIP' and includes a 'Convert to Holding' button. A progress bar shows 'Research' as the active step. On the left, an 'Add Investment +' button is present, and a card for 'Self Invested Personal Pension' is shown with details like 'Investment Amount: £227,787.27' and 'Risk Category: Moderately Cautio...'. The main panel features filters for 'Term' (10), 'Filter Results by Provider', and 'Filter Results by Product'. Below these are 'Sort Results by Value' options: Growth %, Final Value £, Charges £, and RLY %. A table of platforms is displayed with 20 of 20 results. The table has columns for Growth, Final Value, Total Fees, and RLY. The first three rows show '7IM' platforms: 'Seven Investment Management 7IM SIPP', 'Seven Investment Management Modular iSIPP', and 'AJ Bell Investcentre AJ Bell Investcentre SIPP'. The last row shows 'AJ Bell Investcentre AJ Bell (Investcentre)'. Each row has a '+' button to the right. At the bottom, there are 'Cancel' and 'Continue to Ex-ante Illustration' buttons.

Platform	Growth	Final Value	Total Fees	RLY
7IM Seven Investment Management 7IM SIPP	4.31%	£339,876.09	£21,901.09	0.69%
7IM Seven Investment Management Modular iSIPP	4.24%	£337,656.25	£24,120.94	0.76%
7IM AJ Bell Investcentre AJ Bell Investcentre SIPP	4.20%	£336,460.76	£25,316.43	0.80%
AJ Bell Investcentre AJ Bell (Investcentre)	4.10%	£333,463.78	£28,333.41	0.90%

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

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

**Please note - As we have used a Central Investment Proposition and selected a segment, only platforms, off platform products, portfolios and funds configured in the CIP will pull through.**

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  
**Test Illustration Nov 21**

Client: Test Client | Description: Test Description Text | Illustration Type: Segment | Segment Name: Segment 1 Test

Research | Basis of Illustration | Client Check-in | Report |  Mark Status as Complete

Investments | Switches/Trades | Fees

**Add Investment +**

- Self Invested Personal Pension**
  - Investment Amount: £223,786.75
  - Risk Category: Moderately Cautio...
  - Target Fund: Royal London UK All Share Tracker Z Acc
- Individual Savings Accounts**
  - Investment Amount: £26,275.14
  - Risk Category: Moderately Cautio...
  - Target Fund: Royal London UK All Share Tracker Z Acc

SYNAPTIC SOFTWARE

Term: 10 | Update Results

Change Segment | Stakeholder Pension | Exclude Fees | 3 Significant Figures

Filter Results by Provider: Filter one or more providers

Filter Results by Product: Filter one or more products

Sort Results by Value: Growth % | Final Value £ | Charges £ | R.I.Y %

Platforms | 11 of 11 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP • AJ Bell Investcentre Investment ISA	3.79%	£354,315.72	£40,407.85	1.21%
AEGON	Aegon Platform Cofunds Pension Account • Aegon ISA	3.72%	£352,211.14	£42,512.43	1.28%
AEGON	Aegon Platform Aegon SIPP • Aegon ISA	3.72%	£352,211.14	£42,512.43	1.28%
7IM	Seven Investment Management The Premier Trust • ISA (Stocks and Shares)	3.69%	£351,090.17	£43,633.40	1.31%

Cancel | Continue to Ec-ante Illustration

**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

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
<b>Lowest R.I.Y Combination</b>	<b>Embark • AJ Bell (Investcentre)</b>	4.53%	£387,028.36	£9,374.83	0.27%
embark platform	Embark Embark ISA	4.69%	£38,679.80	£857.96	0.31%
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP	4.74%	£348,348.57	£8,516.87	0.26%

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

Platforms | 22 of 22 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
AJBell Investcentre	AJ Bell (Investcentre) AJ Bell Investcentre SIPP • AJ Bell Investcentre Investment ISA	4.63%	£383,508.60	£12,894.59	0.37%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular iSIPP • Modular Stocks & Shares ISA	4.58%	£381,913.88	£14,489.31	0.42%
FundsNetwork	FundsNetwork FundsNetwork Personal Pension • FundsNetwork (No Investor Fee)	4.58%	£381,814.36	£14,588.83	0.42%
AEGON	Aegon Platform Cofunds Pension Account • Aegon ISA	4.56%	£381,313.28	£15,089.91	0.44%