

# Ex-Ante - Research Filtering

Last Modified on 26/05/2022 11:57 am BST

**Term Update Results** button will refresh the results

This button will be greyed out on the Whole of Market Research

**Change Segment** will only be available when using a CIP

**Stakeholder Pension** when selected, will appear at the top of the results

**Exclude Fees** in the results

**Report**

**3 Significant Figures**

**Filters not needed on Ex-ante Research**

**Unselect/Select Investments** to include in the results

## Term

**Term**

10 Update Results

When updating the term, click **Update Results**

**Term** 10 Update Results

Change Segment Stakeholder Pension Exclude Adviser Fees 3 Significant Figures Report

**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 £ RLY %

▼ Platforms 1 of 1 Results

	<b>Aegon Platform</b> AJ Bell Investcentre SIPP	Growth 4.65%	Final Value £339,651.80	Total Fees £11,143.95	RLY 0.35%	+
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## Filter Results by Provider

Ex-Ante only Research is based on selecting a single product.

### Filter Results by Product

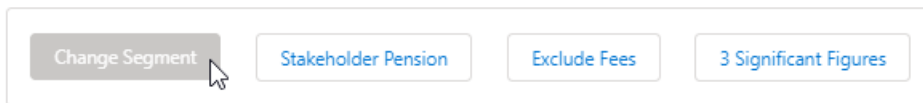
Ex-Ante only Research is based on selecting a single product.

### Sort Results by Value

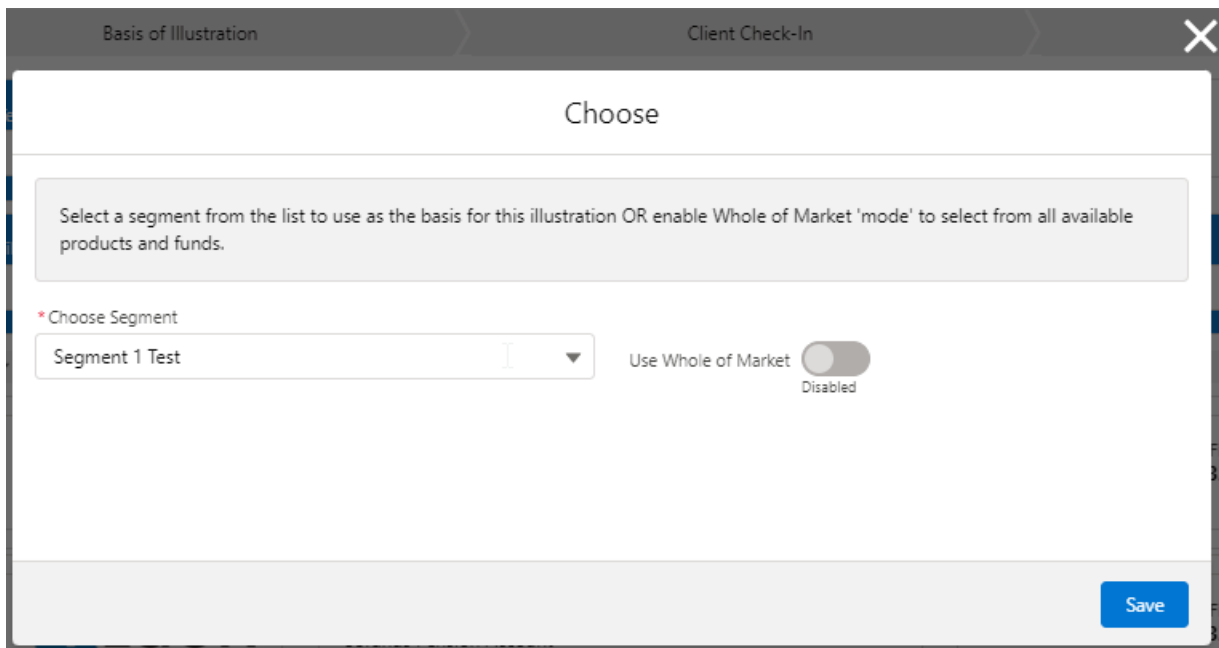
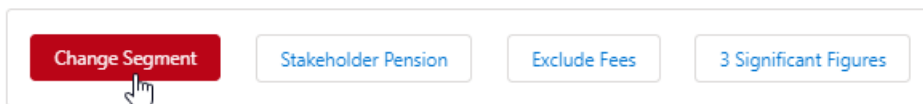
Ex-Ante only Research is based on selecting a single product.

### Change Segment

This button will be disabled on Whole of Market Research:

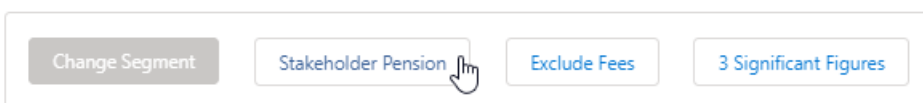


If using a Central Investment Proposition, the button will be available to select and will allow you to change segment:



### Stakeholder Pension

When Stakeholder Pension is selected, it will be displayed at the top of the results screen:



Term: 10 | Update Results

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

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 £ | RLY %

Platform	Growth	Final Value	Total Fees	RLY %
Stakeholder Pension Basic Pension for Comparison Purposes	3.71%	£11,443.72	£39,352.02	1.29%

Platforms: 1 of 1 Results

Platform	Growth	Final Value	Total Fees	RLY %
Aegon Platform AJ Bell Investcentre SIPP	4.65%	£339,651.80	£11,143.95	0.35%

If a Retirement wrapper is not added to the research, **Stakeholder Pension** button will be disabled.

### Exclude Fees

When **Exclude Fees** is selected, the results screen will recalculate.

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

Term: 10 | Update Results

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

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 £ | RLY %

Platform	Growth	Final Value	Total Fees	RLY %
Aegon Platform AJ Bell Investcentre SIPP	4.65%	£340,000	£11,100	0.35%

Platforms: 1 of 1 Results

### 3 Significant Figures

When selected, 3 significant will be displayed in the Results.

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

Term: 10 | Update Results

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

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 £ | RLY %

Platform	Growth	Final Value	Total Fees	RLY %
Aegon Platform AJ Bell Investcentre SIPP	4.65%	£340,000	£11,100	0.35%

Platforms: 1 of 1 Results

