

Switching - Research Screen

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This article is a continuation of [Switching - Creating within a client record](#)

The screenshot shows the Synaptic Research interface for a client record titled "Test Pension Switch". The interface is divided into three main sections: "Ceding Scheme", "Target Scheme", and "Outcome".

- Ceding Scheme:** This section is highlighted with an orange header. It contains a "+ Add Ceding Scheme" button and an illustration of a landscape with a sun, clouds, and a car. Below the illustration, there is instructional text: "To start, add a ceding scheme by selecting the Add Ceding Scheme action. When a valid scheme is present a scheme card will appear with a consolidated scheme card. As more schemes are added the consolidated scheme will update and the calculated information will be used as the basis to populate the target scheme and outcome calculations." A callout bubble points to this section with the text: "Add one or more ceding schemes".
- Target Scheme:** This section has a blue header and a "+ Add Target Scheme" button. It features an illustration of a landscape with clouds and mountains. Below the illustration, it says: "Add a ceding scheme first, using the Add Ceding Scheme action. When a valid ceding scheme is present the Add Target Scheme will become active." A callout bubble points to this section with the text: "Once ceding schemes have been added, Add target scheme."
- Outcome:** This section has a green header and an illustration of binoculars. Below the illustration, it states: "Critical Yield, Hurdle Rate, Growth Rate and Report will be displayed here when a valid ceding and target scheme are present."

The top of the screen includes a navigation bar with "Synaptic Pathways" and various menu items like "Research", "Portfolio Builder", and "Investment Pathways". A search bar is also visible. The bottom right corner of the interface has a "Mark Status as Complete" button.

The screenshot displays the Synaptic Pathways interface for a research opportunity. The interface is divided into several sections:

- Ceding Scheme:** Shows a 'Consolidated Scheme' with metrics: Current Value (£77,651.00), Maturity Value (£103,200.00), Growth Rate (Mid) (4.67%), and RLY (1.85%). Below it, individual schemes like 'Aberdeen Asset Managers Limited' and 'Quilter' are listed with their respective values and RLYs.
- Target Scheme:** Displays 'Investment' details including 'Switches/Trades' and 'Fees'. The 'Target Scheme' section shows 'Product Comparison Basis', 'Term' (10Yrs 3Mos), 'Target Portfolio' (Vanguard LifeStrategy 60% Equity A), and 'Risk Category' (Balanced (Low End)).
- Outcome:** Shows a 'Switch Result' with 'Critical Yield' (3.30%), 'Hurdle Rate' (-1.37%), 'Growth Rate (Mid)' (4.67%), and 'RLY' (0.49%).
- Results:** A table comparing 'Consolidated Ceding Schemes' and 'Platforms'. The consolidated scheme has a Growth of 2.82%, Final Value of £103,200.00, Total Fees of £20,697.37, and RLY of 1.85%. The 'Fidelity Adviser Solutions' platform has a Growth of 4.18%, Final Value of £118,094.25, Total Fees of £5,878.11, and RLY of 0.49%.

Callouts provide additional context:

- Consolidated scheme details:** Points to the Consolidated Scheme card.
- Add Switches/Trades & Fees:** Points to the Investment section.
- Target Scheme Investment details:** Points to the Target Scheme section.
- Outcome details including RIY, Growth, Critical Yield and Hurdle Rate:** Points to the Switch Result card.
- Edit Target Scheme:** Points to the Target Scheme card.
- Edit Scheme:** Points to the Edit icon on the Consolidated Scheme card.
- Report:** Points to the Report button on the Switch Result card.
- Update Results:** Points to the Update Results button.
- Ceding Schemes are listed individually:** Points to the list of individual schemes.
- Untick individual schemes and update the results:** Points to the checkboxes next to individual schemes.
- Platforms & Off Platform options will be listed in the results:** Points to the Platforms section in the Results table.
- Consolidated scheme details will be listed at the top of the results for comparison:** Points to the Consolidated Ceding Schemes row in the Results table.
- Cheapest option automatically selected:** Points to the checked checkbox next to the Fidelity Adviser Solutions platform.

For further information on Switch research, see article [Switching - Add Ceding Scheme](#)