

Can research be conducted from a holding that hasn't been converted from Ex-Ante Research?

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Yes, In the 4.2 release you are able to select a new holding (including generic) and create an ex-post review.

When the ex-post review loads, you will see the same screen as when using a converted holding from ex-ante research, but there will be no **Previous** state.

As seen below:

The screenshot displays the 'Ex-post Review' interface for 'Client Test'. The top navigation bar includes 'Synaptic Pathways' and various menu items. The main content area is titled 'Review' and shows a 'Client Check-In' process. It features a 'Review Workbench' with tabs for 'Stochastic Forecast', 'Deterministic Forecast', 'Suitability', 'Costs & Charges', 'Capacity for Loss', 'Compliance Details', and 'Report Content'. The interface is divided into four main sections: 'Previous', 'Current', 'Proposal', and 'What's Shown Here'. The 'Previous' section shows 'Last Reviewed State' as 'No data to display'. The 'Current' section shows 'Current State' as '16 Jun 2022'. The 'Proposal' section is highlighted with a green border and contains 'Optimise' and 'Reset' buttons. The 'What's Shown Here' section prompts the user to 'Choose the basis of the review and create a target recommendation.' Below these sections is a 'Review Summary' table comparing 'Current' and 'Proposal' states for a 10-year term.

Term	10 Years	10 Years
Net Invested Over Term	£0.00	£0.00
Gross Outcome (No Charges/Fees)	£165,930.61	£165,930.61
Total Charges + Fees	£7,644.10	£7,644.10
Expected Outcome (Deterministic)	£158,286.51	£158,286.51
Value of Advice	£0.00	£104,474.78

For more information on how to create an ex-post review, see articles:

[Video - Ex-Post Reviews.](#)

[Article - Ex-Post Reviews - How to create a review](#)