

# Comparison & Ex-Ante - Research Screen

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In the example below, we have added a **Pension** as an investment. If you are unsure of how to add investments, see article [Comparison with Ex-Ante - Add Investment](#) for details.

The screenshot displays the Synaptic Pathways Research interface. At the top, there is a search bar and a navigation menu with options like Home, Paraplanner Access Centre, and Research. The main header shows the client name 'Susanna West' and the title 'Susanna Comparison w/ Ex-ante'. Below this, there are tabs for 'Research', 'Review', 'Client Check-in', and 'Report'. The 'Research' tab is active, showing a list of investments. On the left, there is an 'Add Investment +' button and a list of investments, including 'Pensions' with an investment amount of £239,691.57 and a risk category of 'Balanced (High End)'. The main area displays a table of investment results, filtered by provider and product. The table shows the following data:

Platform	Product	Growth	Final Value	Total Fees	RLY
P   PLATFORM	P1 Investment Management The P1 SIPP	3.84%	£342,701.68	£38,031.15	1.16%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular iSIPP	3.78%	£340,972.15	£39,760.68	1.22%
RAYMOND JAMES	Raymond James Investment Services Ltd AJ Bell Investcentre SIPP	3.78%	£340,971.36	£39,761.47	1.22%
F	Fidelity Adviser Solutions	Growth	Final Value	Total Fees	RLY

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

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

In the example below, we have added **Pensions** and **Individual Savings Account**. The platforms listed show Pensions and ISAs included:

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base My Apps & Settings Valuations

Search...

Susanna Comparison w/ Ex-ante

Client: Susanna West Description: Test Description Text Illustration Type: Whole of Market Segment Name: Policy Type:

Research Review Client Check-in Report

Investments Trades Fees AUM

Add Investment +

**Pensions** Edit  
Investment Amount: £239,691.57 Risk Category: Balanced (High End)  
Target Fund: Vanguard LifeStrategy 60% Equity A Shares Acc

**Individual Savings Accounts** Edit  
Investment Amount: £22,620.00 Risk Category: Balanced (High End)  
Target Fund: Vanguard LifeStrategy 40% Equity A Shares Acc

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 37 of 37 Results

Platform	Product	Growth	Final Value	Total Fees	R.I.Y
PLATFORM	P1 Investment Management The P1 SIPP • P1 ISA	3.84%	£373,243.65	£40,595.43	1.16%
JAMES HAY PARTNERSHIP	James Hay Partnership Modular ISPP • Modular Stocks & Shares ISA	3.78%	£371,337.17	£42,501.90	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity Personal Pension • Fidelity (No Investor Fee)	3.78%	£371,269.31	£42,569.76	1.22%
Fidelity	Fidelity Adviser Solutions Fidelity (No Investor Fee) • Fidelity Personal Pension	3.78%	£371,269.31	£42,569.76	1.22%
Standard Life	Elevate Elevate Pension Investment Account • Elevate Stocks & Shares ISA - Explicit	3.77%	£370,938.43	£42,900.64	1.23%

Cancel Continue to Ex-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

	<b>Lowest R.I.Y Combination</b>	AJ Bell (Investcentre) • AJ Bell (Investcentre)	Growth: 3.49%	Final Value: £374,743.57	Total Fees: £39,095.50	R.I.Y: 1.13%	+
	AJ Bell (Investcentre)	AJ Bell Investcentre Investment ISA	Growth: 3.12%	Final Value: £28,904.64	Total Fees: £4,201.60	R.I.Y: 1.88%	
	AJ Bell (Investcentre)	AJ Bell Investcentre SIPP	Growth: 3.94%	Final Value: £345,838.94	Total Fees: £34,893.90	R.I.Y: 1.06%	

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

Platforms 37 of 37 Results

	<b>P1 Investment Management</b> The P1 SIPP • P1 ISA	Growth: 3.84%	Final Value: £373,243.65	Total Fees: £40,595.43	R.I.Y: 1.16%	+
	<b>James Hay Partnership</b> Modular ISPP • Modular Stocks & Shares ISA	Growth: 3.78%	Final Value: £371,337.17	Total Fees: £42,501.90	R.I.Y: 1.22%	+
	<b>Fidelity Adviser Solutions</b> Fidelity Personal Pension • Fidelity (No Investor Fee)	Growth: 3.78%	Final Value: £371,269.31	Total Fees: £42,569.76	R.I.Y: 1.22%	+
	<b>Fidelity Adviser Solutions</b> Fidelity (No Investor Fee) • Fidelity Personal Pension	Growth: 3.78%	Final Value: £371,269.31	Total Fees: £42,569.76	R.I.Y: 1.22%	+
	<b>Elevate</b> Elevate Pension Investment Account • Elevate Stocks & Shares ISA - Explicit	Growth: 3.77%	Final Value: £370,938.43	Total Fees: £42,900.64	R.I.Y: 1.23%	+
	<b>Quilter</b> Collective Retirement Account • ISA	Growth: 3.77%	Final Value: £370,899.76	Total Fees: £42,939.31	R.I.Y: 1.23%	+
	<b>Quilter</b> ISA • Collective Retirement Account	Growth: 3.77%	Final Value: £370,899.76	Total Fees: £42,939.31	R.I.Y: 1.23%	+

