

Comparison & Ex-Ante - Trades

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Add switch information through the **Trades** tab.

The screenshot shows the 'Susanna Comparison w/ Ex-ante' interface. The 'Trades' tab is selected, and the 'Add Investment' button is highlighted. The interface displays a list of investments, including Pensions and Individual Savings Accounts, with details such as Investment Amount, Target Fund, and Risk Category. The 'Trades' tab is also visible in the top navigation bar.

The 'Trades' configuration form is shown, with a hand cursor pointing to the 'Trades' tab. The form includes the following fields and options:

- Trades (Buy/Sell):** Input field with value 0.
- Frequency of Trades:** Dropdown menu with value Monthly.
- % of Current Balance to Trade:** Input field with value 0.00%.
- Value Balance is determined during the R.I.Y calculation when the trade is applied.**
- Set Trades +** button.

The **Set Trades +** button will become available once information is complete. **Set Trades +** to apply to the Results:

Investments **Trades** Fees AUM

[+ Add Trades \(Optional\)](#)
Provide a number of trades, the frequency and percentage of the value balance to trade.

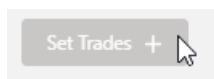
Trades (Buy/Sell)

Frequency of Trades

% of Current Balance to Trade

Value Balance is determined during the R.I.Y calculation when the trade is applied.

The button will be greyed out once applied.



The button will become available again if any changes are made.
