

# Comparison & Ex-Ante - Research Filtering

Last Modified on 13/02/2024 3:34 pm GMT

**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**

**Filter Results by Provider**

**Filter Results by Product**

**Sort Results by Value**

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

The screenshot shows a web interface for research filtering. At the top, there are navigation tabs: 'Investments', 'Switches/Trades', and 'Fees'. Below this, there are several filter and action buttons: 'Term' (with a dropdown showing '10' and an 'Update Results' button), 'Change Segment' (highlighted in red), 'Stakeholder Pension', 'Exclude Adviser Fees', '3 Significant Figures', and 'Report'. There are also three dropdown menus for 'Filter Results by Provider', 'Filter Results by Product', and 'Sort Results by Value'. The main content area displays a table of investment results with columns for Growth, Final Value, Total Fees, and RLY. The table lists three items: '7IM Seven Investment Management (Shares) - 7IM SIPP', '7IM Seven Investment Management ISA (Stocks and Shares) - Modular iSPP', and 'P | PLATFORM P1 Investment Management P1 ISA - The P1 SIPP'. On the left side, there are two investment cards: 'Individual Savings Accounts' and 'Self Invested Personal Pension', each with an 'Add Investment' button and a checkbox.

## Term

The image shows a close-up of the 'Term' filter. It consists of a blue header with the word 'Term' in white. Below the header is a white input field containing the number '10'. To the right of the input field is a grey button with a circular refresh icon and the text 'Update Results'.

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

Term: 15 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 27 of 27 Results

	<b>Seven Investment Management</b> ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	RLY 0.10%	<span>+</span>
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • Modular iSIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	RLY 0.16%	<span>+</span>
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	Growth 4.80%	Final Value £418,181.31	Total Fees £7,198.53	RLY 0.20%	<span>+</span>
	<b>P1 Investment Management</b> P1 ISA • The P1 SIPP	Growth 4.76%	Final Value £416,601.28	Total Fees £8,778.56	RLY 0.24%	<span>+</span>
	<b>AJ Bell (Investcentre)</b> AJ Bell Investcentre Investment ISA • AJ Bell Investcentre SIPP	Growth 4.72%	Final Value £415,275.55	Total Fees £10,104.29	RLY 0.28%	<span>+</span>

## Filter Results by Provider

Filter the results by selecting one or more providers in the drop down:

Term: 10 Update Results

Filter Results by Provider: Filter one or more providers

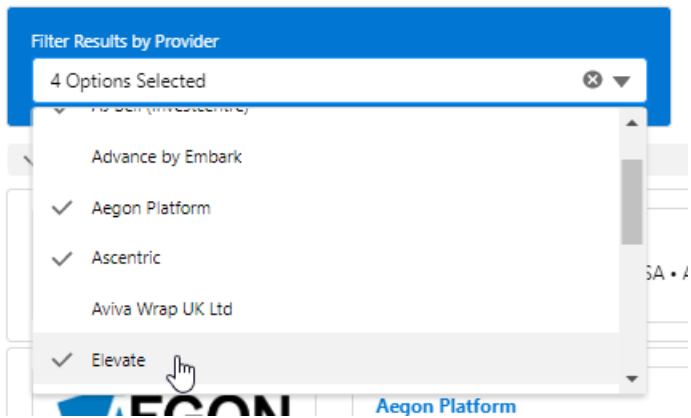
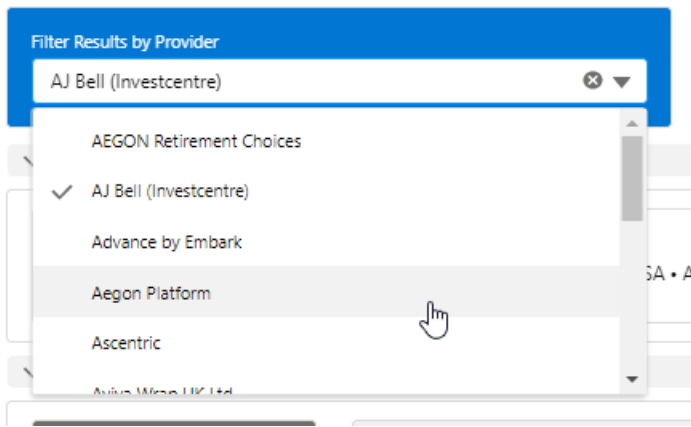
Filter Results by Product: Filter one or more products

- AEGON Retirement Choices
- AJ Bell (Investcentre) 👤
- Advance by Embark
- Aegon Platform
- Ascentric

**James Hay Partnership**  
Modular Stocks & Shares ISA • Modular iSIPP

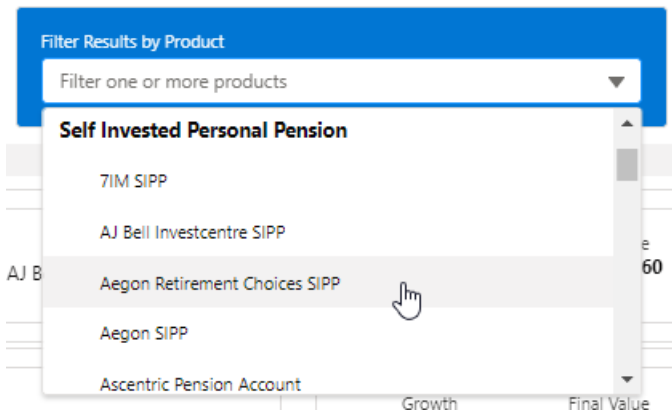
Filter Results by Provider: AJ Bell (Investcentre) ✕ ▼

Click back into the drop down to select multiple providers

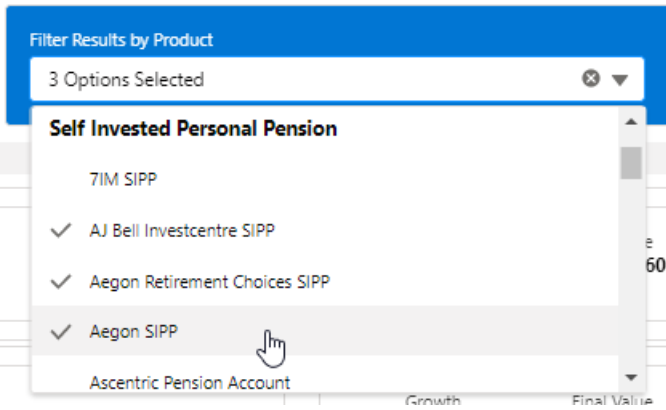


### Filter Results by Product

Filter the results by selecting one or more products in the drop down:



Multiple products can be selected:



## Sort Results by Value

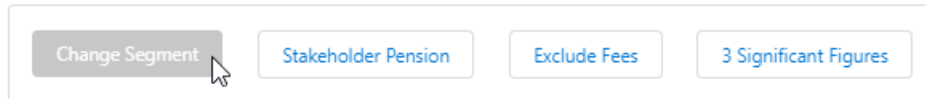
Select the button you would like to sort the results by:



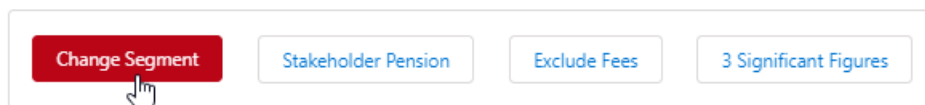
Note: It may seem like the results in the list are not updating. this may be because the Growth, Final Value, Charges and R.I.Y are already ascending.

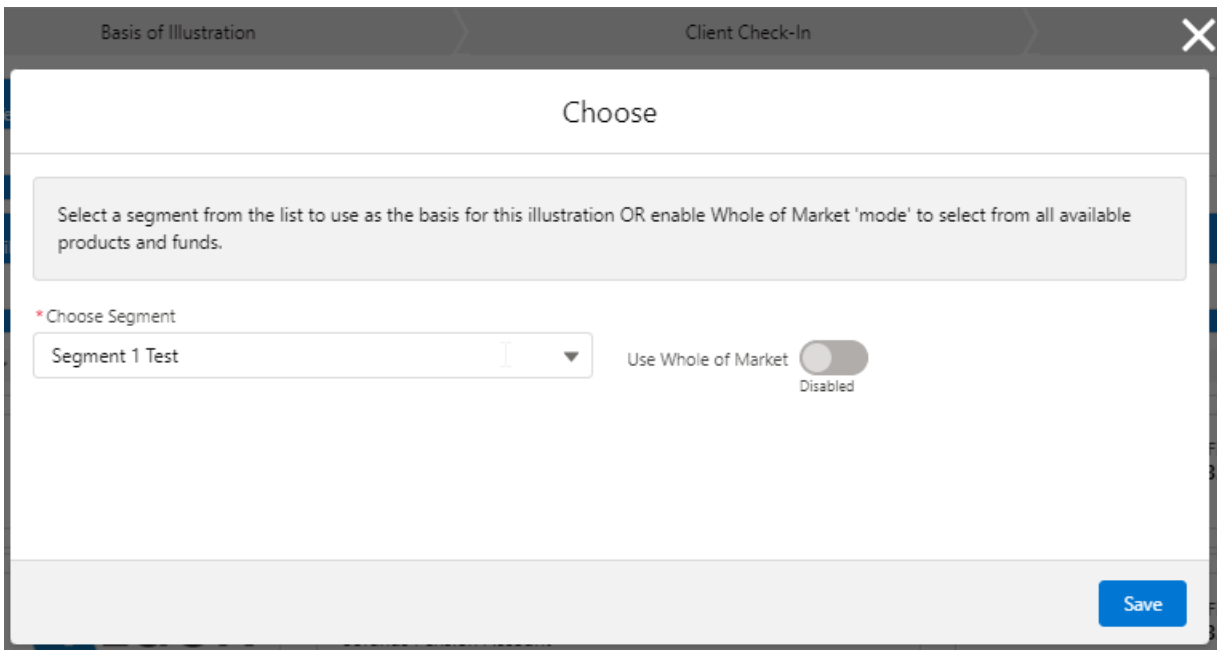
## Change Segment

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:

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 £ R.I.Y %

Stakeholder Pension		1 of 1 Results			
	<b>Stakeholder Pension</b> Basic Pension for Comparison Purposes	Growth 3.70%	Final Value £321,672.22	Total Fees £40,104.97	R.I.Y 1.30%

▼ Platforms 27 of 27 Results

<b>7iM</b>	<b>Seven Investment Management</b> ISA (Stocks and Shares) • 7iM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	R.I.Y 0.10%	+
<b>7iM</b>	<b>Seven Investment Management</b> ISA (Stocks and Shares) • Modular iSIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
<b>7iM</b>	<b>Seven Investment Management</b> ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	Growth 4.80%	Final Value £418,181.31	Total Fees £7,198.53	R.I.Y 0.20%	+

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 to reflect values based on zero

adviser charges.

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 £ R.I.Y %

Platforms 27 of 27 Results

	<b>Seven Investment Management</b> ISA (Stocks and Shares) • 7IM SIPP	Growth 4.90%	Final Value £421,714.00	Total Fees £3,665.84	R.I.Y 0.10%	+
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • Modular ISIPP	Growth 4.84%	Final Value £419,422.76	Total Fees £5,957.08	R.I.Y 0.16%	+
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	Growth 4.80%	Final Value £418,181.31	Total Fees £7,198.53	R.I.Y 0.20%	+
	<b>P1 Investment Management</b> P1 ISA • The P1 SIPP	Growth 4.76%	Final Value £416,601.28	Total Fees £8,778.56	R.I.Y 0.24%	+

### 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 £ R.I.Y %

Platforms 27 of 27 Results

	<b>Seven Investment Management</b> ISA (Stocks and Shares) • 7IM SIPP	Growth 4.9%	Final Value £422,000	Total Fees £3,670	R.I.Y 0.1%	+
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • Modular ISIPP	Growth 4.84%	Final Value £419,000	Total Fees £5,960	R.I.Y 0.16%	+
	<b>Seven Investment Management</b> ISA (Stocks and Shares) • AJ Bell Investcentre SIPP	Growth 4.8%	Final Value £418,000	Total Fees £7,200	R.I.Y 0.2%	+
	<b>P1 Investment Management</b> P1 ISA • The P1 SIPP	Growth 4.76%	Final Value £417,000	Total Fees £8,780	R.I.Y 0.24%	+

