

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

Unselect/Select Investments to include in the results

Filters not needed on Ex-ante Research

The screenshot shows a web interface for 'Ex-Ante Research Filtering'. It includes a navigation menu, a header with 'Test Illustration Example 22', and a main content area with tabs for 'Investments', 'Switches/Trades', and 'Fees'. The 'Investments' tab is active, showing a list of investments with a 'Self Invested Personal Pension' selected. The interface also features a 'Term' input field with '10', an 'Update Results' button, and several filter buttons: 'Change Segment', 'Stakeholder Pension', 'Exclude Adviser Fees', and '3 Significant Figures'. A 'Report' button is also present. The results section shows a table with columns for Growth, Final Value, Total Fees, and R.I.Y., with one result from 'AEGON' displayed.

Term

Term

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

The screenshot shows the 'Term' input field with '13' entered and the 'Update Results' button highlighted with a mouse cursor. The other filters and the results table are also visible.

Filter Results by Provider

Ex-Ante only Research is based on selecting a single product.

Filter Results by Product

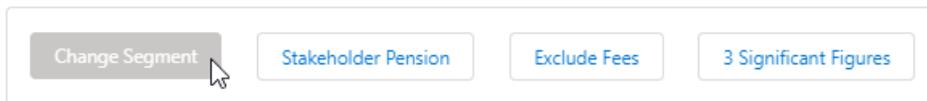
Ex-Ante only Research is based on selecting a single product.

Sort Results by Value

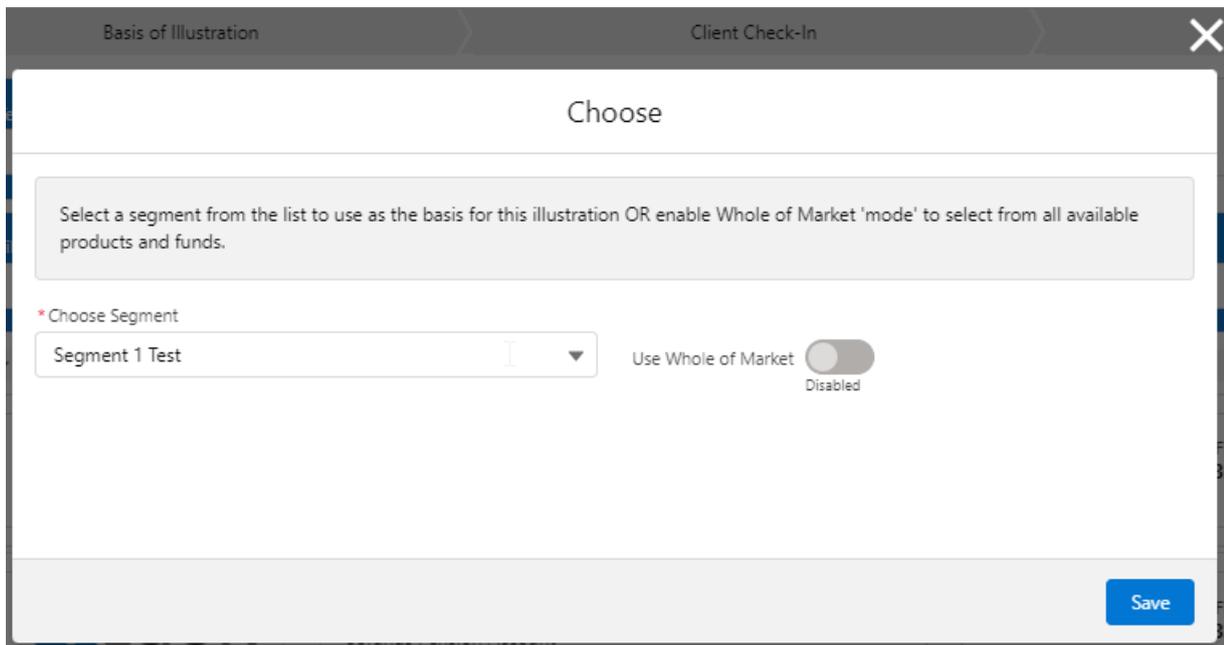
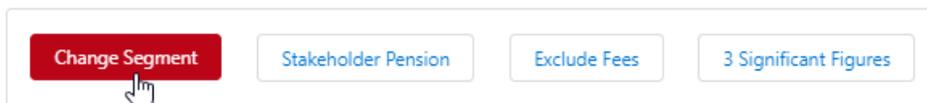
Ex-Ante only Research is based on selecting a single product.

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:



Research Review Client Check-In Report Mark Status as Complete

Investments Switches/Trades Fees

Term: 10

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 %

Stakeholder Pension 1 of 1 Results

	Stakeholder Pension Basic Pension for Comparison Purposes	Growth 3.71%	Final Value £311,443.72	Total Fees £39,352.02	RLY 1.29%	<input type="button" value="+"/>
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Platforms 1 of 1 Results

	Aegon Platform AJ Bell Investcentre SIPP	Growth 4.65%	Final Value £339,651.80	Total Fees £11,143.95	RLY 0.35%	<input type="button" value="+"/>
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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.

Research Review Client Check-In Report Mark Status as Complete

Investments Switches/Trades Fees

Term: 10

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 1 of 1 Results

	Aegon Platform AJ Bell Investcentre SIPP	Growth 4.65%	Final Value £339,651.80	Total Fees £11,143.95	RLY 0.35%	<input type="button" value="+"/>
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3 Significant Figures

When selected, 3 significant will be displayed in the Results.

Research Review Client Check-In Report Mark Status as Complete

Investments Switches/Trades Fees

Term: 10

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 1 of 1 Results

	Aegon Platform AJ Bell Investcentre SIPP	Growth 4.65%	Final Value £340,000	Total Fees £11,100	RLY 0.35%	<input type="button" value="+"/>
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