

Comparison & Ex-Ante using a CIP - Research Screen

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

This article explains the Research screen in Comparison & Ex-Ante research, using a Central Investment Proposition. If you have not setup a CIP, this can be done in the Investment Pathways tab. For more information on how to create & build your CIP, see articles [here](#).

In the example below, we have added a **Pension** as an investment. See article [Comparison with Ex-Ante using a CIP - Add Investment](#) for details on adding investments to your Research.

The screenshot displays the Synaptic Research interface for a 'Susanna Comparison w/ Ex-ante'. The client is 'Susanna West' and the illustration type is 'Whole of Market'. The screen is divided into several sections:

- Investments:** A sidebar on the left with an 'Add Investment +' button. A 'Pensions' investment is added, showing an investment amount of £239,601.57, a risk category of 'Balanced (High End)', and a target fund of 'Vanguard LifeStrategy 60% Equity A Shares...'. The Synaptic logo is visible at the bottom of this section.
- Review:** A central area with a 'Term' dropdown set to '10' and an 'Update Results' button. Below this are filters for 'Filter Results by Provider' and 'Filter Results by Product', both set to 'Filter one or more providers/products'. A 'Sort Results by Value' dropdown is set to 'Growth %'. A 'Change Segment' button is also present.
- Platforms:** A table showing 41 of 41 results for various investment platforms. The table includes columns for Growth, Final Value, Total Fees, and RLY. The platforms listed are:

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

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

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

Please note - As we have used a Central Investment Proposition and selected a segment, only platforms, off platform products, portfolios and funds configured in the CIP will pull through.

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

Synaptic Pathways

Search: _____

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

Research **Susanna Comparison w/ Ex-ante** Convert to Holding

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

Research | Review | Client Checkin | Report Mark Status as Complete

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

Synaptic

Terms: 10 Update Results

Change Segment Stateholder 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 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

Lowest R.I.Y Combination	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

	P1 Investment Management The P1 SIPP • P1 ISA	Growth: 3.84%	Final Value: £373,243.65	Total Fees: £40,595.43	R.I.Y: 1.16%	+
	James Hay Partnership Modular ISPP • Modular Stocks & Shares ISA	Growth: 3.78%	Final Value: £371,337.17	Total Fees: £42,501.90	R.I.Y: 1.22%	+
	Fidelity Adviser Solutions 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%	+
	Fidelity Adviser Solutions 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%	+
	Elevate 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%	+
	Quilter Collective Retirement Account • ISA	Growth: 3.77%	Final Value: £370,899.76	Total Fees: £42,939.31	R.I.Y: 1.23%	+
	Quilter ISA • Collective Retirement Account	Growth: 3.77%	Final Value: £370,899.76	Total Fees: £42,939.31	R.I.Y: 1.23%	+

