

Comparison & Ex-Ante using a CIP - Trades

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

The screenshot shows the Synaptic Research Comparison w/ Ex-ante interface. The 'Trades' tab is selected in the left-hand navigation menu. The main area displays a table of investment platforms with columns for Growth, Final Value, Total Fees, and R.I.Y. The table lists platforms like PLATFORM, JAMES HAY, Fidelity Adviser Solutions, and Standard Life. A 'Trades' tooltip is visible over the 'Trades' tab in the navigation menu.

The screenshot shows the 'Trades' configuration form. The form includes fields for 'Trades (Buy/Sell)' (set to 0), 'Frequency of Trades' (set to Monthly), and '% of Current Balance to Trade' (set to 0.00%). A 'Set Trades +' button is visible at the bottom.

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.

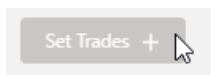
Trades (Buy/Sell)

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.



Any changes to the information will make the button available again.
