

Risk Illustrations - Results Screen

Last Modified on 13/02/2024 3:35 pm GMT

The Results screen shows the forecasted return based on the criteria entered and the overall suitability of the illustration plan to meet the objective.

The screenshot displays the 'Results' screen for a risk illustration. It includes a navigation breadcrumb trail, a summary of input parameters, and two main forecast graphs. Callout boxes provide the following information:

- Top Left:** The tiles summarise the information you have entered on the Illustration.
- Top Middle:** Use the breadcrumbs to go back a step.
- Top Right:** Suitability, Compliance Details, Report Content & Advanced Options.
- Right Side:** Expected Outcome (Mean Gain), Lowest Outcome (Min. Gain), Highest Outcome (Max. Gain), and Strategic Asset Allocation Comparison Information.
- Bottom Left:** Toggle between Projection, Probability and Portfolio graphs.
- Bottom Right:** Toggle on Results + no costs, Results + Costs, Result + Inflation, Results + Costs + Inflation.
- Bottom Center:** Maximise graph.

Summary of Input Parameters:

- Term of investment: 10 Years
- Initial Amount: £200,000.00
- Regular Contribution: £300.00 / pm
- Regular Withdrawal: £300.00 / pm
- Growth Basis: Without Inflation
- Rebalanced Annually: Yes
- Total Sold: 1.70%
- Potential Year Loss: 13.00%
- Potential Year Gain: £28,000.00
- Investment Risk Category: Balanced (Low End)
- Objective Risk Category: Balanced (High End)
- Investment Scenario Pathway: Any Test Portfolio

Forecasted Outcomes:

- Expected Outcome (Mean Gain): £246,190.88 or 23.02%
- Lowest Outcome (Min. Gain): £193,340.00 or -23.33%
- Highest Outcome (Max. Gain): £357,148.00 or 78.57%

Forecast Graphs:

- Forecast based on strategic asset allocation - No costs:** Shows a line graph for Forecast Mean Returns and Forecast Min. Returns, and a bar chart for Forecast Max. Return Contributions and Withdrawals over 10 years.
- Forecast based on investment scenario - No costs:** Shows a line graph for Forecast Mean Returns and Forecast Min. Returns, and a bar chart for Forecast Max. Return Contributions and Withdrawals over 10 years.

Strategic Asset Allocation Comparison:

- Moody's stochastic engine is accessed directly by this application and provides data to populate these graphs, showing:
 - Probability-based (stochastic) forecasts for the strategic asset allocation representing the risk category, alongside.
 - The forecast is based on the investment proposal, or adviser recommendation.
 - Simulation models the full range of viable outcomes.
 - Values indicated are high and low final fund values expected by the model (percentile from the distribution model), and the average indicated is the

For further information on the Results screen, see the following articles:

[Illustrations - Edit Outcome](#)

[Illustrations - Outcome - Efficient Frontier](#)