Risk Illustrations - Results + Costs

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

The Results + Costs button will display the forecasted return based on the criteria entered and the overall suitability of the illustration plan to meet the objective.

The Results include costs:

| Synaptic Pathways Home Paraplanner Access | Q Search Centre Contacts V Research V Portfolio | Builder 🗸 Investment Pathways Generic I | funds 🗸 Configuration | ★ ▼ ♣ ? ✿ ♣ * Risk Illustration Risk Illust ∨ × * More ▼ | |
|--|---|---|---|---|--|
| Risk Illustration Risk Illustration | | | | Duplicate Illustration Edit Delete | |
| t Client Risk Category Client1 Moderately Cautious (High End) | Created Date 28/09/2023, 10:43 | | | | |
| | | | | | |
| Investment Details | ×) | Outcome | | Report V Mark Status as Comple | |
| rm of Investment Initial Amount 9 Years £200,000.00 | Growth Basis Total Solution Cost Without inflation 1.40% | Investment Risk Category Obje Balanced (Low End) Mod | ective Risk Category lerately Cautious (High E | Expected Outcome (Mean Gain) £367,113.03 or 67.63% | |
| gular Contribution Regular Withdrawal 200.00 / pm £500.00 / pa | Rebalanced Annually Potential First Year Loss Yes 14.88% or £30,042.72 | Investment Scenario Pathway Vanguard LifeStrategy 60% Equity A | Shares Acc 😐 | Lowest Outcome (Min. Gain) Highest Outcome (Max. Gain) £204,895.00 or -6.44% £578,153.00 or 164% | |
| Results Capacity For Loss Suitability 🧔 Com | pliance Details 🔚 Report Content 💉 Adva | nced Options | | | |
| | | | | | |
| Select a View to Display Result + No Costs Result | t + Costs Result + Inflation Result + Costs + Infla | tion | | | |
| | | | | | |
| Forecast based on investment scenario - No costs | Forecast based on inve | Forecast based on investment scenario - With Costs | | What's Shown Here | |
| <u>الا</u> الم | <u>~</u> % @ | | | | |
| | | | | Strategic Asset Allocation Comparison | |
| 6800000 | £800000 | | | ic engine is accessed directly by this application and provides these graphs, showing: | |
| £800000 | C663k | 200000 E178. 1090 E400000 E199 E199 E199 E199 E199 E199 E199 | | 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. | |
| £800000 £549 | 2800000 | | | | |
| £400000 £375 £340k | 2421k 200000 | | | odels the full range of viable outcomes. | |
| 2200 277 C704 L177 276 L177 176 L177 177 176 L177 177 176 L177 177 176 L177 177 177 177 177 177 177 177 177 17 | 2224k 1234k 2221k | | | indicated are high and low final fund values expected by the Sth percentile from the distribution model), and the average xpected outcome'. | |
| £0 1 2 3 4 5 6 7 8 | θ 10 E0 | 3 4 5 6 7 8 9 10 | | | |
| Years ● Forecast Mean Return ● Forecast Max. Return ● Net Money In | turn Forecast Me | Years an Return | | | |
| Forecast Mean Return Forecast Max. Return Forecast Max. Return Contributions Withdrawals | Forecast Ma | x. Return ONet Money In s OWithdrawals 통기 분열 | | | |
| Expected Outcome £420,782.64 or 92.14% | Expected Outcome £367,113.03 or 67.639 | 6 | | | |
| Lowest Outcome (5% Chance) £234,300.00 or 6.99% | Lowest Outcome (5% Char £204,895.00 or -6.449 | ce) | | | |
| ±234,300.00 or 6.99% Highest Outcome (5% Chance) | Highest Outcome (5% Cha | | | | |
| | 5570 457 00 AC100 | | | | |
| £663,240.00 or 202.85% | £578,153.00 or 164% | | | | |