## Are there any tips when using fund research?

Last Modified on 30/05/2017 1:24 pm BST

Synaptic Research obviously responds faster if there are fewer funds which it needs to display in the grid. Therefore, wherever possible, it's best to set up filtering, using the **Features** and **Stats** tabs, **before** you add funds to the grid using the **Sectors** tab. Let's say that you are going to research all unit trusts in the UK All Companies sector, and you are only interested in funds with positive alpha, whose average quartile ranking is 2.5 or better, and which have been around for at least five years. It's more efficient to set up this filtering first (using the Stats tab as illustrated by the screenshot below) and then add the sectors using the Sectors tab, rather than selecting the sectors first and then filtering the grid down.

SYNAPTIC SOFTWARE			Fund data Investment trusts									
Filtering		🛛 🖻 Ranki	ng   🖗 Report   Chang	ge title   Availability   Save a:	s PDF   Delete	Copy   Send	Not shared	Convert to	manual   Help			
Features Sectors Conditions	Stats 🔳		1	Showing 1 to 1 of 1 fund		Fact	sheets	Graph	Options			
Quartile ranking 1 year	>= ¥	_			Risk	Quartiles:	Fund	Investment				
Quartile ranking 3 years	>- ¥		Fund		Mipha	quartile	Years of	All				
Quartile ranking 5 years	>= V		Crystal Amber		1.62	3	7	Yes				
Quartile ranking 10 years	>= 🗸											
Quartile consistency	>= 🗸											
Avg. quartile rank	>= 💙 2.5											
Risk metrics												
Volatility	>= 🗸											
Alpha	>= 💙 0.0	1										
Beta	>= 🗸											
Sector correlation	>= 🗸											
Information ratio	>= 🗸											
Sharpe ratio	>= 🗸											
Sortino ratio	>= 🗸											
Sector covariance	>= ¥											
Cash covariance	>= V											
Kurtosis	>* 🗸	~										

## Fund features

The Features tab of fund research includes a number of items which are quick ways of filtering out funds based on minimum performance requirement. The Top Crown rating field eliminates contracts unless they are top-ranked (i.e. 5 Crowns) by FE; the quartile features eliminate funds unless they have been top-quartile performers over the chosen period. All of these are simply quick ways of imposing conditions which can also be set via the Stats tab. The first screenshot below shows filtering on the features for the FE Crown rating, and on quartile ranking over 3 years.

B servere							Fund data
ntang				14	farling   # B	ique   Darg	e lite   Anabistry   Enverse POF   Debte   Dayy   Event   Net shared   Convert is manual (Help
Federal Sectors Conditions South R	Showing the total of the funds				-		Factors State Desce
3 Mind Investment Ch. 27h Shares (and Yout)	held.	perf. D L		anala Anala		La La La	
34 Nard Doubtert 20% 40% Dates (Uni Tool)				101010.0			
In Next Investment 475-455 Shares (and Trust)	The Multiple Colored Color & Alex	17.50	1.5	1871.76	84	100	
The second se	Bandwa UK Lower Cap A Acc	16.79	1.5	14.5	80	100	
() 34 Mones Martial (and Trail)	HFH Cale Crewk	16.17	1.8	233.27	As.	Ves.	
24 North Itmenia (Unit Trust)	FBC UK Mid Cap 3 Acc	13.49	1.0	25.87	80	784	
bit North American Smaller Companies (Unit Prust)	Aberdeen Property Share A Acc	15.57	1.5	400.4	700	80	
	Daniard Life Investments UK Byoty Unserainting	14.56	1.0	1287	64	Ves.	
S. Resonal Panaona (SnC Yald)	Edentries UK Equity Drawth A.	14.88	1.8	181.31	80	788	
2 34 Property (Unit Trust)	Threadneadle UK Wid 250 Kat Acc	54.02	1.5	120.25	80	760	
i in insected (Jack Truet)	Premier Part European Property & Inc.	14.13	1.8	126.47	Vin.	44	
	Prankle UK Panagers Poous A Ass	13.78	1.8	134.58	. Ni	784	
34 Short Term Money Market (Unit Truet)	Cevendah Opportunitiep A	12.45	1.5	130.37	80	788	
24 Specialist (Joh Trust)	Lisetnus Special Grantiens 8 Inc.	13.51	1.28	1492.3	84	Vite-	
C 14 Designs Companies Read Class Trust	Premier Billion A. Sto	12.99	1.8	101.61	No.	786	
C) is being colours to a fault start	Supher UK Growth Inc	12.77	1.5	15/20-89	80	799	
34. Berley Kiph Yald (Sell Yund)	Renderson UK Equity Income & Granth 2 Inc	12.51	1.8	551.51	84	100	
24 Gentury Enviropin Road (Unit Trust)	Edwader UK Rid 250 A Aus	11.5	1.0	1182	Re .	788	
Ownerstands have been been	Majedie UK Pocus A	12.15	2	429	80	760	
T in technic records record that the	Harltensugh UK Halti Cap Growth & Dre	13.14	1.5	91.21	No.	200	
34 Technology Is Telecome (Ibril Trust)	Randard Life Downletents UK Blocal Rel	12.14	1.0	240.8	Av.	788	
V 34 UK dil Companies (Unit Trust)	Renderson Ghibel Cere UK Shoome A Sho	12.08	1.5	379.8	80	788	
-	SVH UK Grawth &	13.06	1.8	154.40	60	100	
34 UK BOURL & Bourd Shoome (Unit Thust)	BLR Revers UK Dynamic Rel	11.00	1.1	10	- No	Yes	
34 UK Bouls Score (3rd Yeal)	Streado Persetual High Shoarne Sho	11.09	1.82	11123-38	50	710	
C N UK Che Cleri Tradi	Investo Perpetual Instante Ins	11.58	1.66	\$342.4	51		
	Drumon Pergetual CK Poeue Ital	1140	1.0	230.83	Ar	714	
In secondes - Cinked Gifts Over Hugo	Shreebed OK Algine & Acc OBF	11.50	1.5	404.57		710	
34 UK Smaller Companies (Julit Trust)	Southan widewa renna, LK Strategie I	61.54	1.5	26.74	-		
C to independent lines hand	Printer Wester UK Grand In	11.00	1.65	1101.13	-	188	
C is a second field with	Kanning Careful & June	11.08	1/2	7.68	40	110	
I rest wet eerigreed (Unit Front)	Indexes IV County & Aug	12.00	10	411.11	-	100	
Case of series	allow as which as a	11.00	1.0	21.01		111	
Chard Mars Bull had I have the	France School Starts in Sco	11.74		End of	-	100	v

The second screenshot shows the equivalent filtering on the

## Stats tab.

Filtering	1	🖲 Ranki	ng   🖗 Report   Change title   Availability   Save	Not shared	hared   Convert to manual   He			
Features Sectors Cond	tions Stats 🔳		Showing 1 to 11 of 11 f	Fact	sheets	Graph Option		
AP 6 years AP 7 years	>= ¥	^	Fund	Risk metrics: Alpha	Quartiles: Avg. quartile rank	Pund details: Years of data	Investment Trust: UK All Compenies	Financia Express rating Crown
AP 8 years	>= 🗸		Aberdeen UK Tracker Trust Pic Ord 10P	-0.5	2.6	10	Yes	
AP 9 years	>= 🗡		Artemia Alpha Trust plc	-0.55	2.7	10	Yes	3
AP 10 years	>- V		Aurora Investment Trust plc	-0.23	3	10	Yes	1
Annual Quartiles			Capital Gearing Trust plc	-0.32	2.8	10	Yes	1
Quartile Yr 1		15	Invesco Perpetual Select UK Equity plc	0.56	1.0	8	Yes	
Quartile Vr 2	Se V	i	JP Norgan Mid Cap IT plc	1.2	2.4	10	Yes	3
Quartere in a	20.04	1	Keystone IT Plc	0.28	2.1	10	Yes	
Quartile Tr 3	2 4	1	Hanchester & London IT plc	-1.55	3.2	10	Yes	
Quartile Yr 4	5= V		Schroder UK Growth plc	-0.99	2.4	10	Yes	
Quartile Yr S	>= 🗸		The Mercantile Investment Trust Pic	0.22	2.2	10	Yes	-
Best/worst			Threadneedle UK Select Trust	-0.04	2.3	10	Yes	1
Best 12-months	>= 🗸							
Worst 12-months	>= 🗸							
Sain years	>* ¥	5 I						
		5 1						

The fields on the Stats tab are obviously more flexible – for example, you can say that you want a quartile ranking of 2 or better, rather than just top-quartile performers. The fields on

the Features tab are simply intended for convenience and speed.

Finding funds within a grid.

If you are looking at a grid which contains lots of funds (e.g. hundreds of funds) and you want to find a specific fund within the grid, you can simply use the find functionality built into your web browser. Simply press **Ctrl+F**.