

# Welcome to Your Quickstart Guide

## Key areas on

### Fund Performance

**Display Fund Performance:** Display funds with corresponding fund performances over several different periods.

### Fund Prices

**Display Fund Prices for a Specific Date:** Display funds with corresponding fund prices.

### Key Information Documents

**Key Information Documents (KIDs):** Click on this button to view the relevant KIDs for products.



## How to find funds



**Display Fund Series:** Most funds we provide have a variety of series to cater for different charging structures. Clicking this icon will show all series of the fund. See your policy schedule for confirmation of the series you are invested in.



Popular

**Display Popular Funds:** This function allows you to view a list of the most popular funds available.



A to Z

**A-Z Fund Filter:** Use this filter icon to quickly and easily find funds listed in alphabetical order.



Asset Type

**Filter Funds by Asset Type:** This option allows you to view all available funds organised by asset type - equities, bonds, cash etc.



Risk

**Filter Funds by Risk Category:** View all available funds by risk category when you choose this option (more than one risk category can be selected).



IRIS

**IRIS:** Display the list of pension funds available through our IRIS and Passive IRIS offerings.



Net

**Net:** Display funds and performance for our net of tax funds.

Standard Suite

**Standard Suite:** Display the list of funds available through our Group Pension standard suite offering.



NEW

Other

**Other:** Provides more options to display funds - **by open and closed funds, by fund manager only** (more than one fund manager can be selected) and by our suite of **Article 8 Funds** (funds that promote Environmental, Social & Governance (ESG) characteristics).

Annualised

**Annualised:** Display fund performance on an annualised basis or cumulative basis.



## How to interact with funds



PDF

**Fund Factsheet:** When viewing a list of funds, select this icon to display the factsheet for the fund you are interested in.



**Select Funds to Compare:** Click this icon when you want to compare a fund against other funds - you can compare performance (which can be changed to specific dates) of up to 10 funds on the one chart.



Show Graph

**Graph up to 10 Funds:** Once you have selected the fund you would like to compare, click **Show Graph** to generate the graph.



History

**View Price History:** To view fund price history, select this function.



## Reporting options



**Forward to a Friend or a Client:** Every page you see or create on **Fund Centre** has its own unique web address. This is useful when doing a fund performance comparison as when you open the link, the information will update to the latest real-time fund performance, saving you time on having to re-run comparisons. You can use this feature to forward the information.



PDF

**Download as a PDF:** Select this function to save the information to your desktop in PDF format using Adobe software or to attach the factsheet or chart to an email in an uneditable format.



**Export Results to Excel:** Click on this icon to export information to Microsoft Excel in an editable format.

## Find out more



Glossary

**Glossary:** Explains some of the most common investment terms.



Popular Documents

**Popular Documents:** This feature provides you with direct access to some of our most popular updates and documents, including this guide.

# Top Ten Features



**1** 

**Always available**  
– 24/7, 365 days a year.

**2** 

Performance and prices **updated daily.**

**3** 


**Quick & easy** to navigate & use.

**4** 

Access all **Article 8 Funds** at the click of a button.

**5** 

**Factsheet** key statistics **updated monthly.**

**6** 


Generate fund **performance graphs** over any timeframe.

**7** 

**Compare** fund performance to funds, markets and leading indices.

**8** 

Access **historical fund prices.**

**9** 

Email friendly options for **sharing information.**

**10** 

**Reporting** tool to build bespoke client performance reports.