For advisers

Our new platform

nucleus platform



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How to use this document

Important information will look like this.

Key messages

Key messages will look like this.



Useful info will look like this.

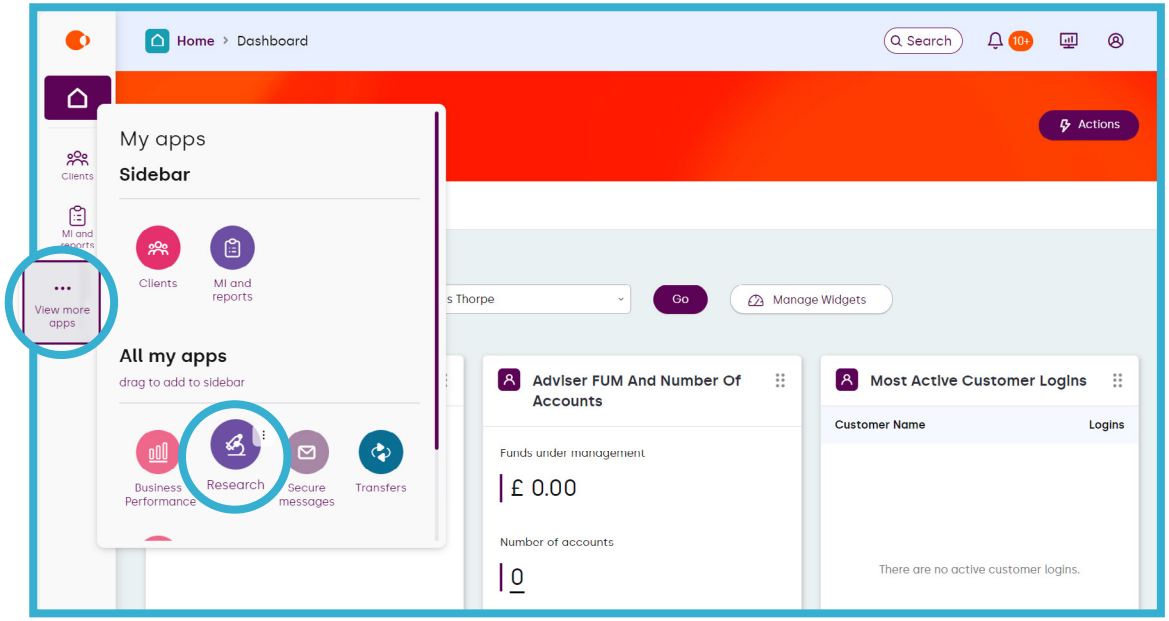
We recommend using the zoom function to view the details on the platform screens in this guide.

How to use the research application

Key message

The research application enables you to search for investment information for funds, Exchange Traded Instruments (ETIs) and portfolios.

To find the research application, from the dashboard, select **'View more apps'**, and then select **'Research'**.



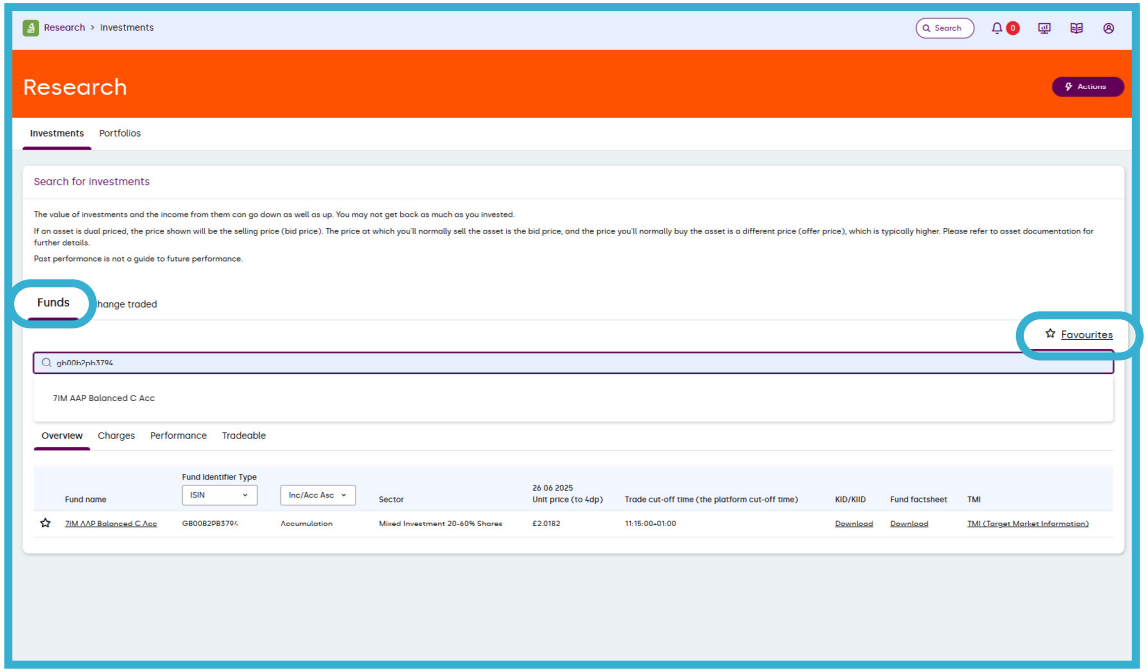
Key message

The research application can be pinned to the side navigation bar, by hovering over **'Research'**, select the vertical ellipsis (three dots), then select **Pin**.

Funds

Select **'Funds'**, then enter the fund name into the search bar. Alternatively, you can use the ISIN, SEDOL or fund code.

Select the investment from the search result.



Key message

You can select '**advanced search**' to refine the search or if little information is known about the investment.

Key message

You can add investments to your favourites lists, by selecting the star symbol.

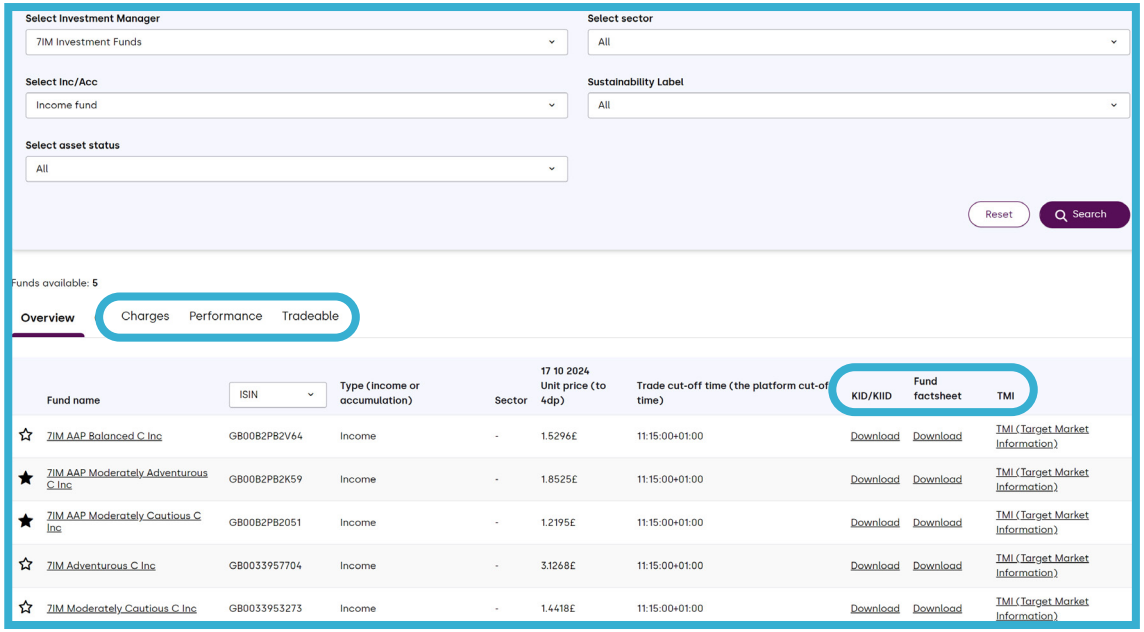
The favourited investments can be viewed by selecting **'Favourites'** above the search bar, to the right.

You can view/download the **'Key Information Document (KID)'** / **'Key Investor Information Document (KIID)'**, **'Fund factsheet'** and the **'Target Market Information (TMI)'** for each investment.

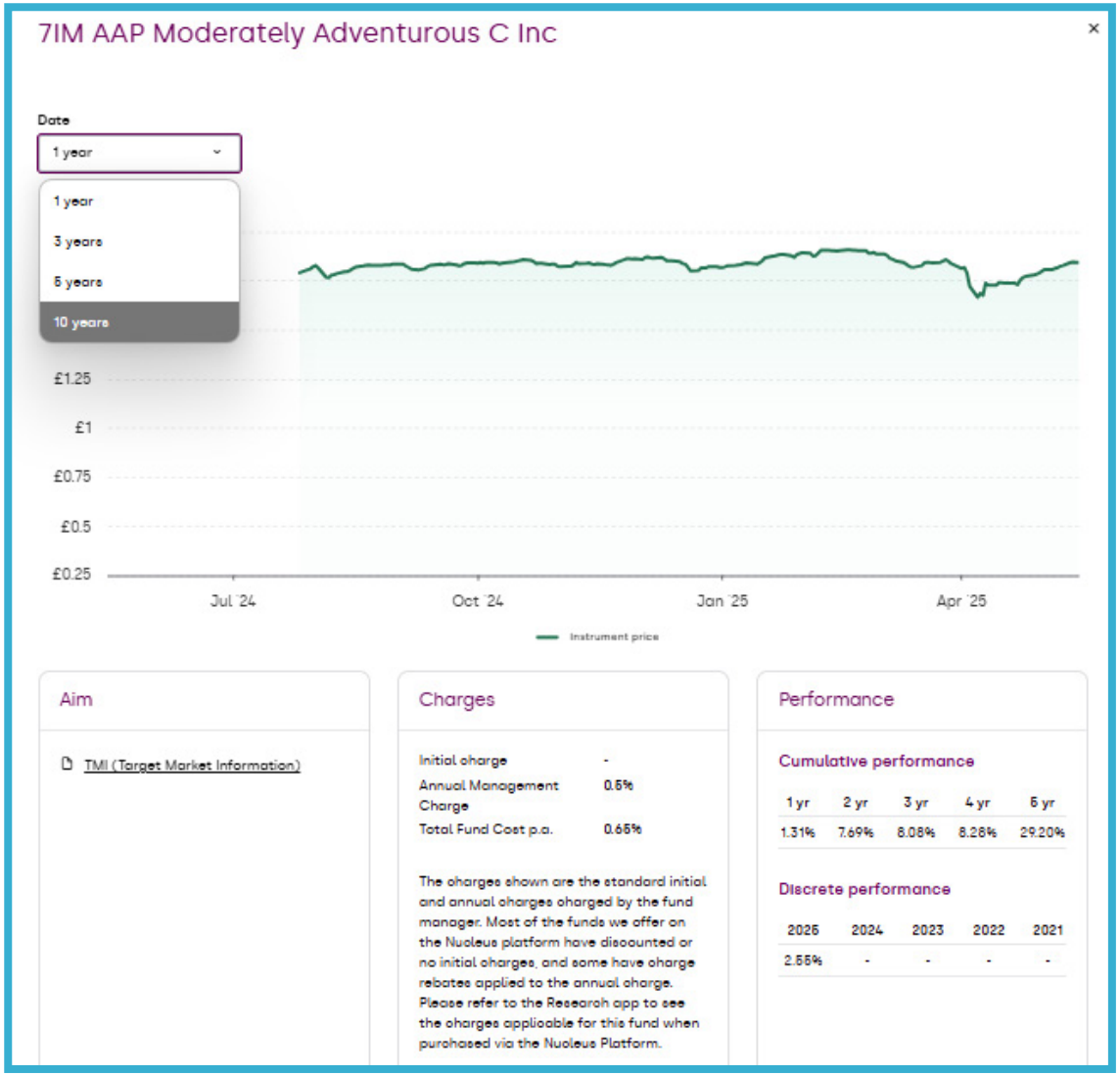
For additional fund information, such as charges and performance details, select the fund name.

Key message

The **'Charges'**, **'Performance'** and **'Tradable'** tabs will provide more investment information and confirm which products the asset is open to for trading.



The date range can be filtered from the drop-down up to a maximum of 10 years.

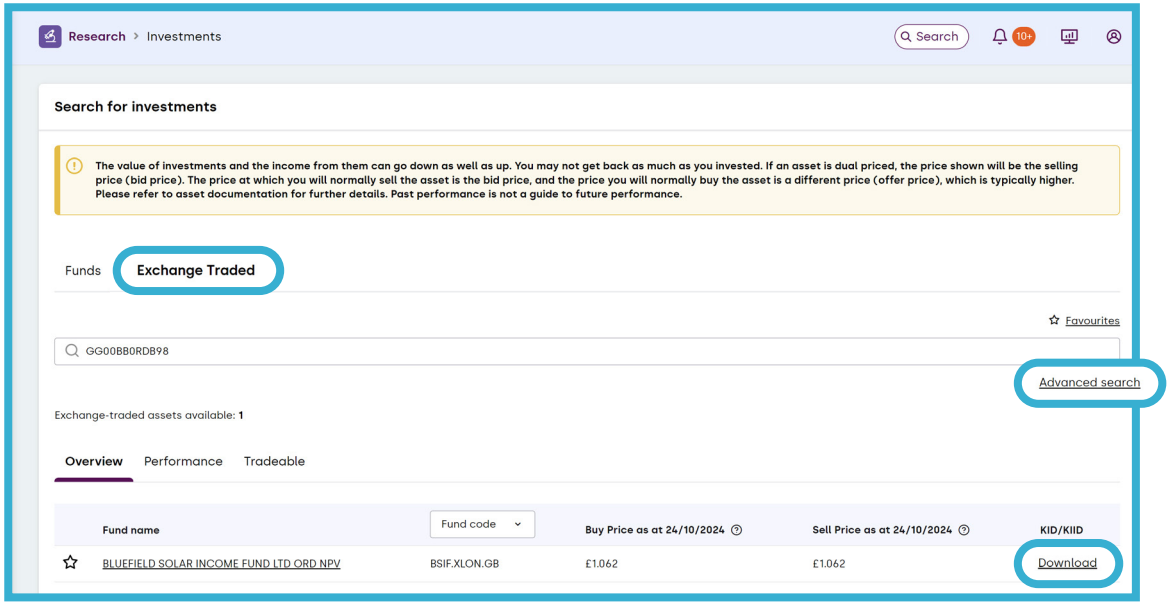


Exchange traded

Select the **'Exchange traded'** tab, and then enter the assets name into the search bar. Alternatively, you can use the ISIN, SEDOL or fund code.

Key message

You can select advanced search to narrow down the search or if little information is known about the investment.



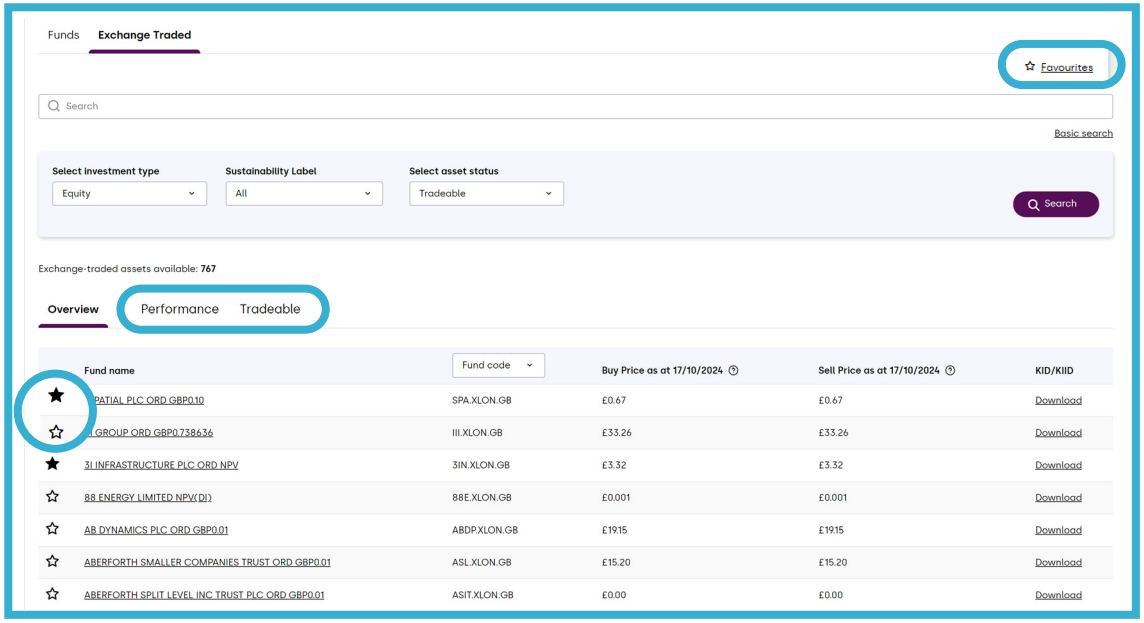
The Key Information Document (KID)/ Key Investor Information Document (KIID) can be downloaded for any of the assets by selecting **'Download'**.

Key message

The **'Performance'** and **'Tradable'** tabs will provide more investment information and confirm which products the asset is open to for trading.

Key message

You can add any results to your favourites, by selecting the star symbol. The favourited investments can be viewed by selecting **'Favourites'** above the search bar, to the right.



For additional fund information such as charges and performance details, select the fund name.

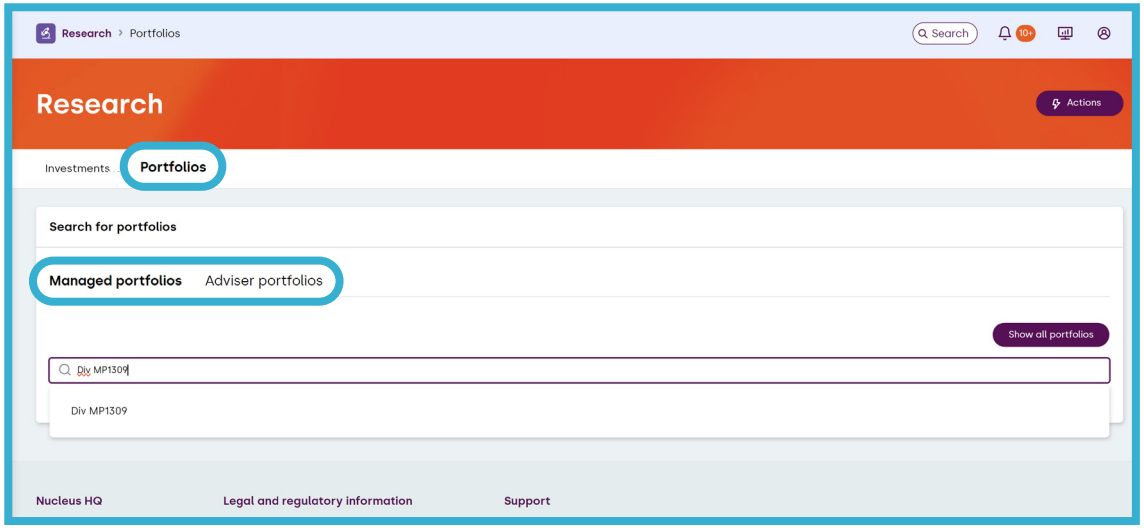
The date range can be filtered from the drop-down up to a maximum of 10 years.



Portfolios

Select the **'Portfolios'** tab.

Select **'Managed portfolios'** or **'Adviser portfolios'**.

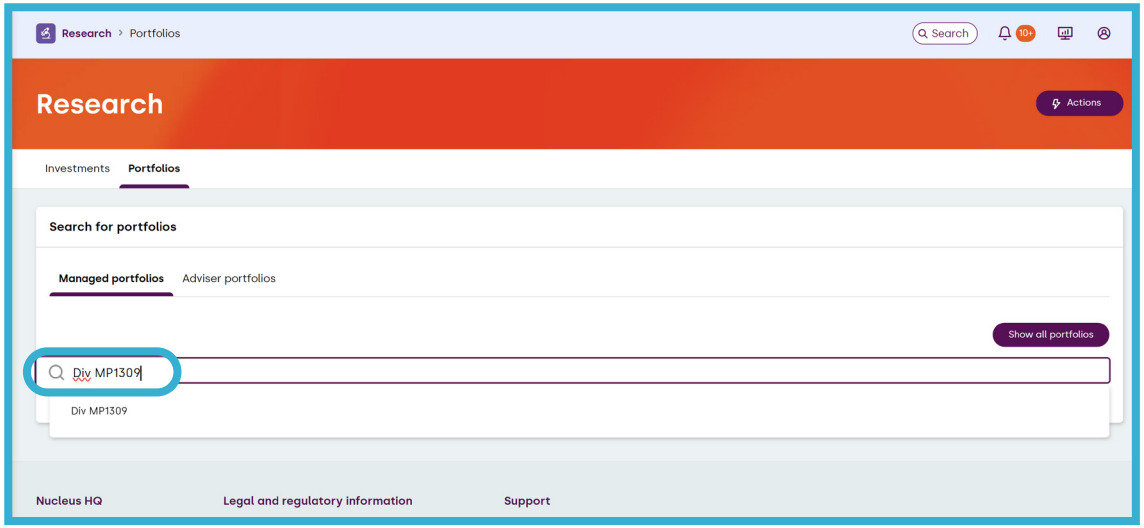


Managed portfolio

Key message

Managed portfolios are created by a fund manager (DFM), and adviser portfolios by the adviser.

Enter the **'Portfolio name'** into the search bar, then select the investment from the search results.



Key message

To obtain permission to trade in a managed portfoli, contact the Investment Manager.

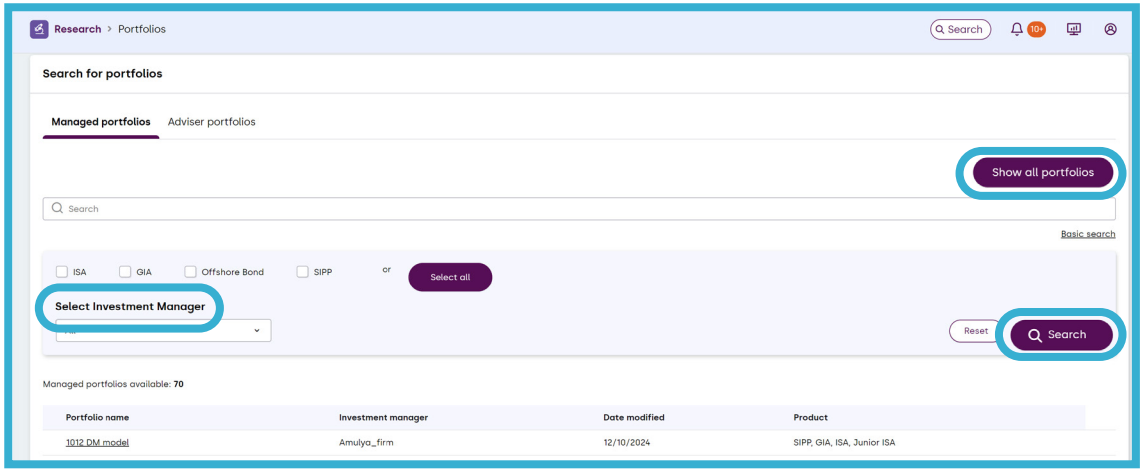
Key message

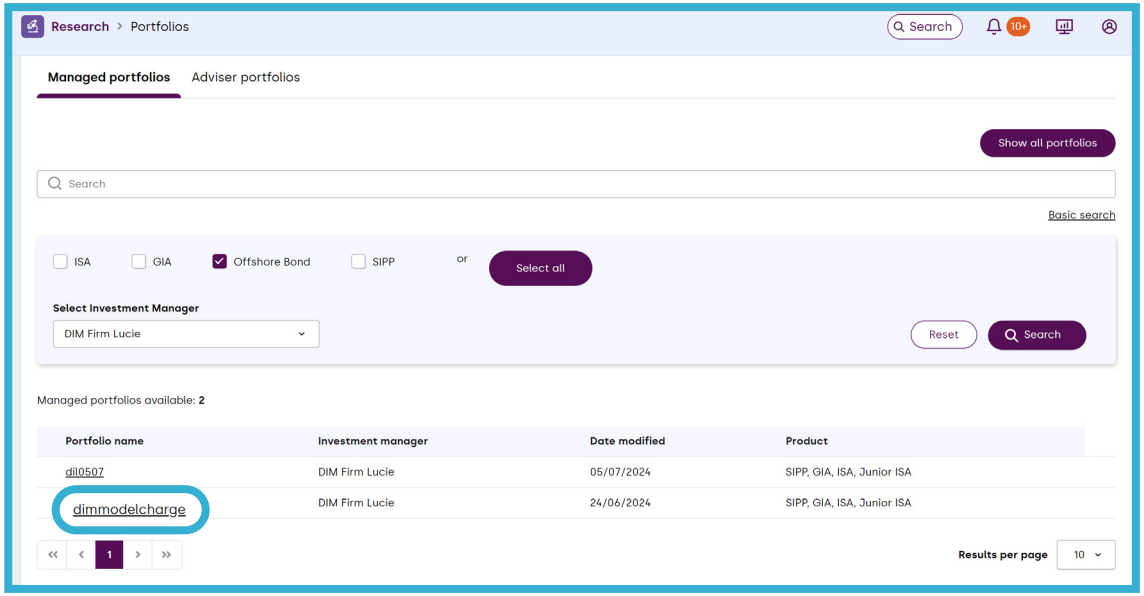
You can select **'Show all portfolios'** to display all available managed portfolios on the platform for your firm.

You can select advanced search to narrow down the search or if little information is known about the investment.

The search results can be refined by selecting the tick boxes next to the products, and/or by using the **'Select Investment Manager'** drop-down list. Then select **'Search'**.

Select a **'Portfolio name'** to view the portfolio details.



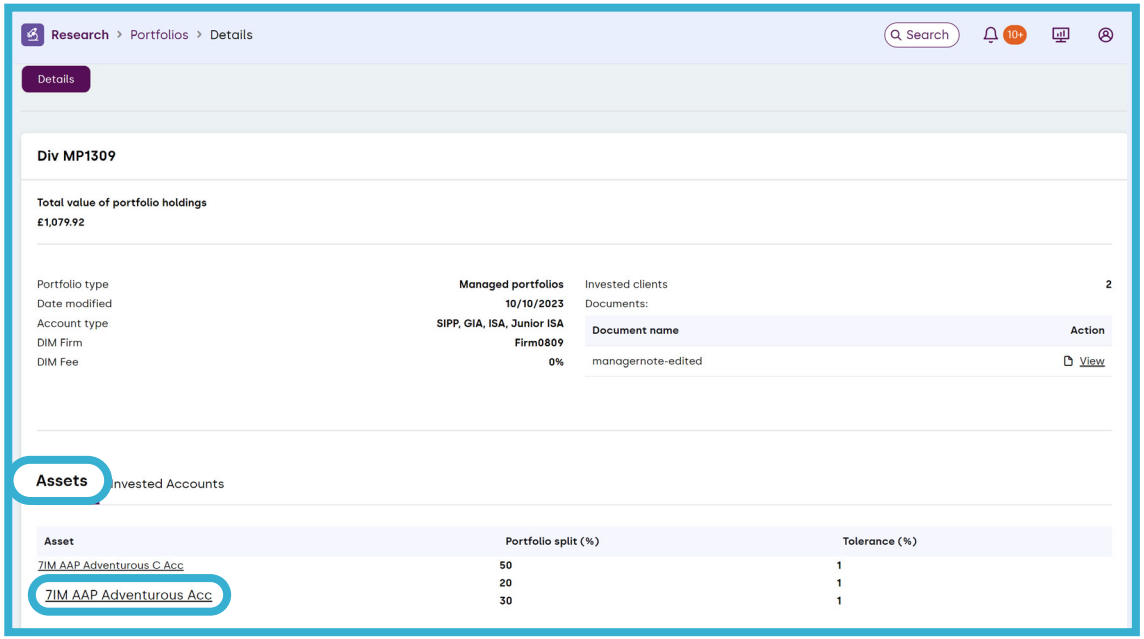


Assets

Select the **'Assets'** tab.

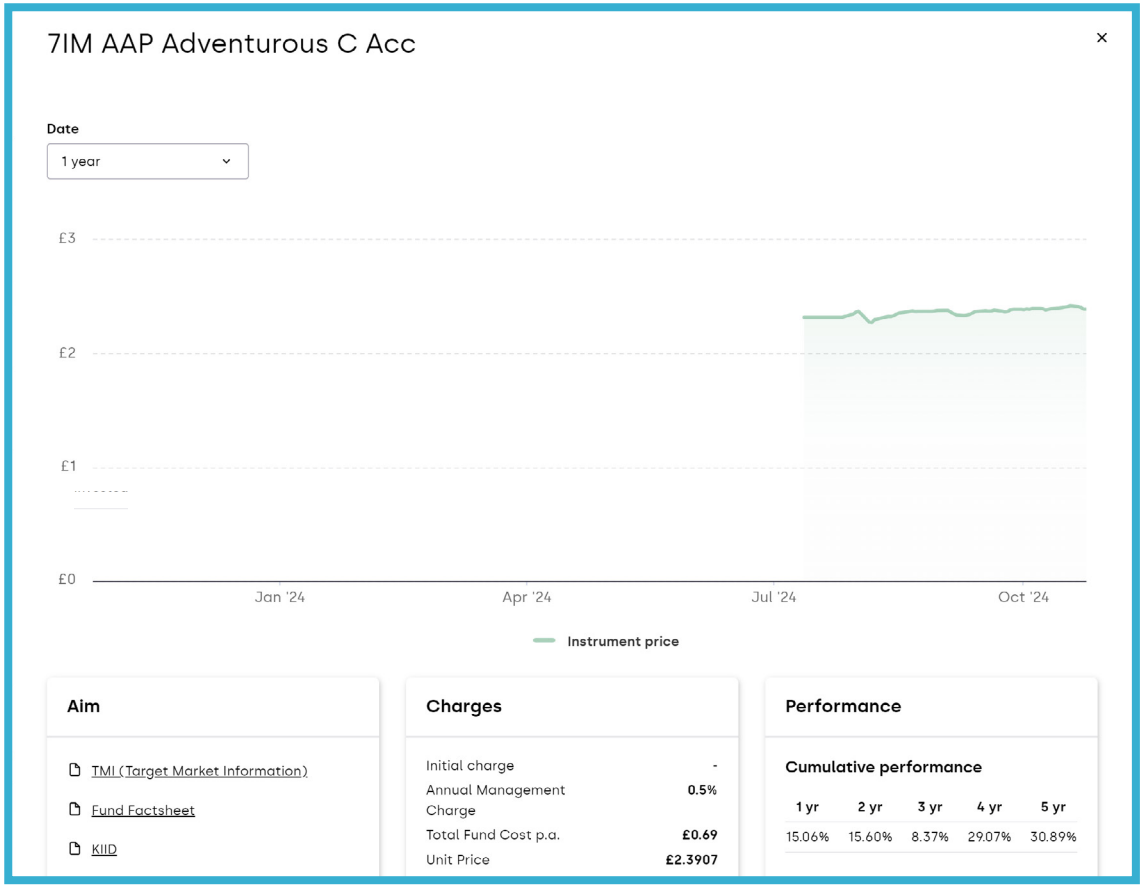
The assets tab will detail the assets that are part of the portfolio, the portfolio split (%) and tolerance (%).

For additional fund information such as charges and performance details, select the fund name.



The date range can be filtered from the drop-down up to a maximum of 10 years.

The Target Market Information (TMI), fund factsheet and Key Investor Information Document (KIID) can be downloaded by selecting the document.

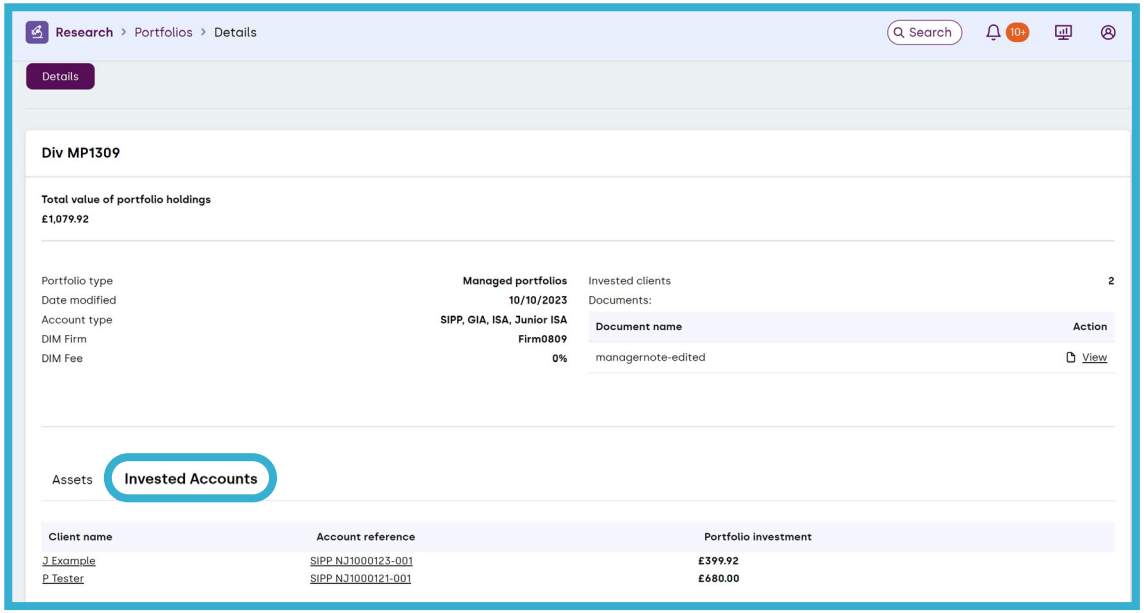


Invested accounts

Select the **'Invested accounts'** tab.

The investment accounts tab will detail the assets that are part of the portfolio, the portfolio split (%) and tolerance (%).

A list of your firm's clients that are invested in this portfolio, the client's account/wrapper, and investment values will be displayed.

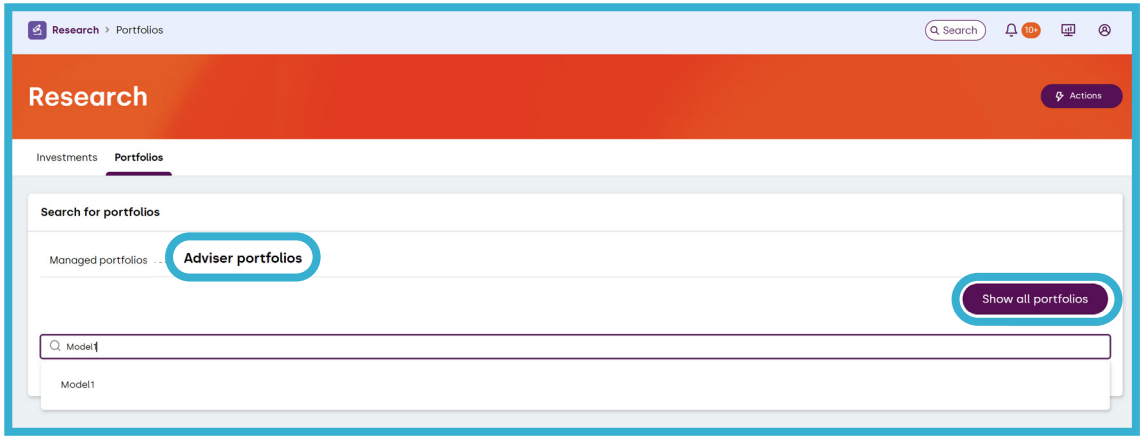


Adviser portfolios

Select **'Adviser portfolios'**.

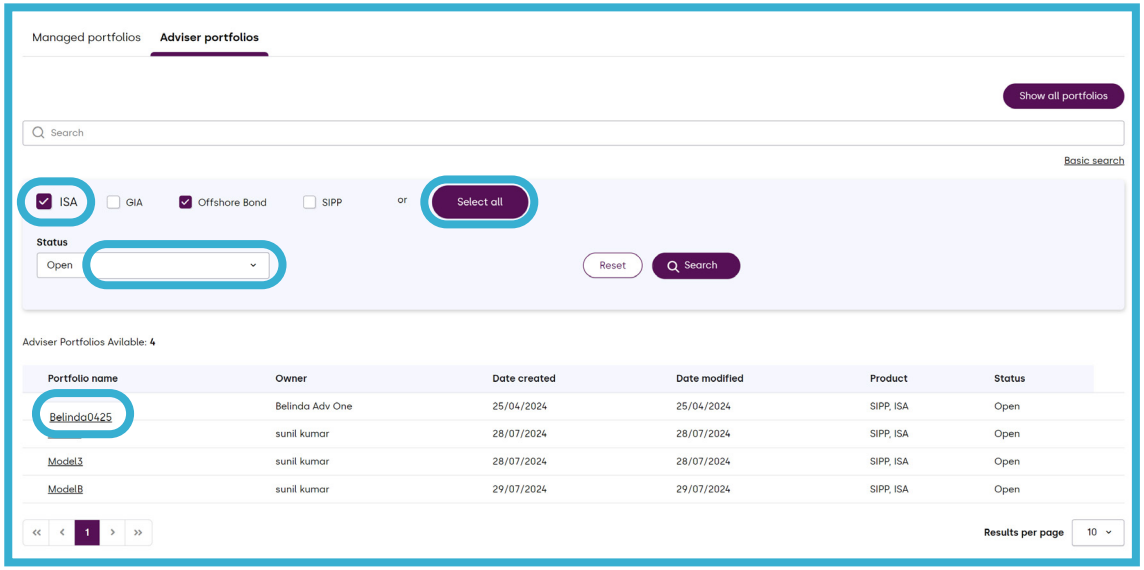
Key message

Managed portfolios are created by a fund manager (DFM), and adviser portfolios by the adviser.



Key message

You can select **'Show all portfolios'** to display all available managed portfolios on the platform for your firm.



The search results can be refined by selecting the tick boxes next to the products, and/or by using the **'Select status'** drop-down list. Then select **'Search'**.

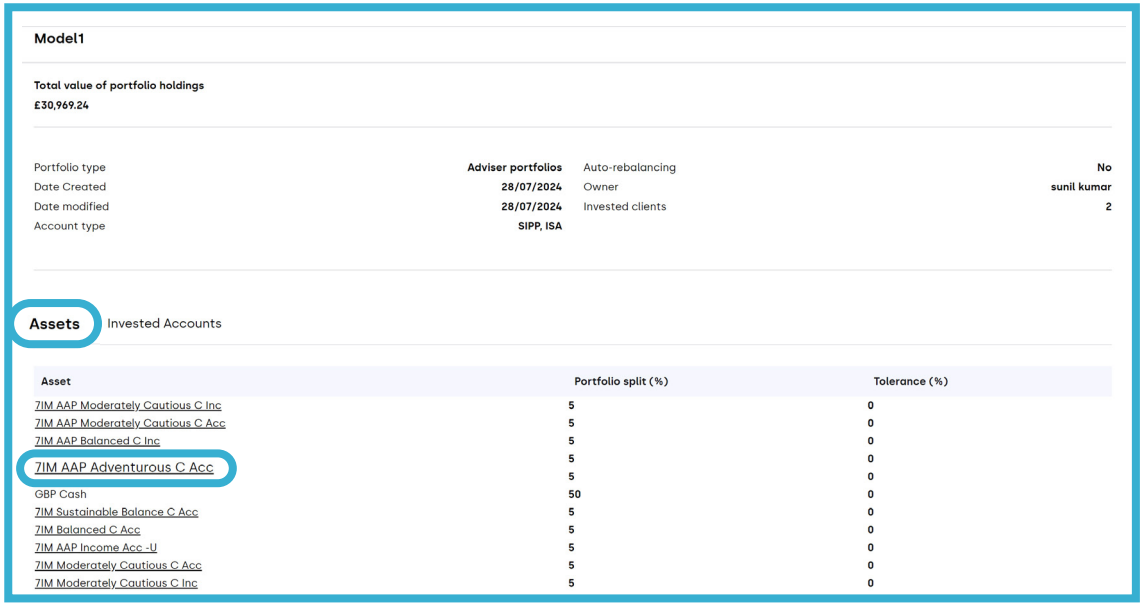
Select a **'Portfolio name'** to view the portfolio details.

Assets

Select the **'Assets'** tab.

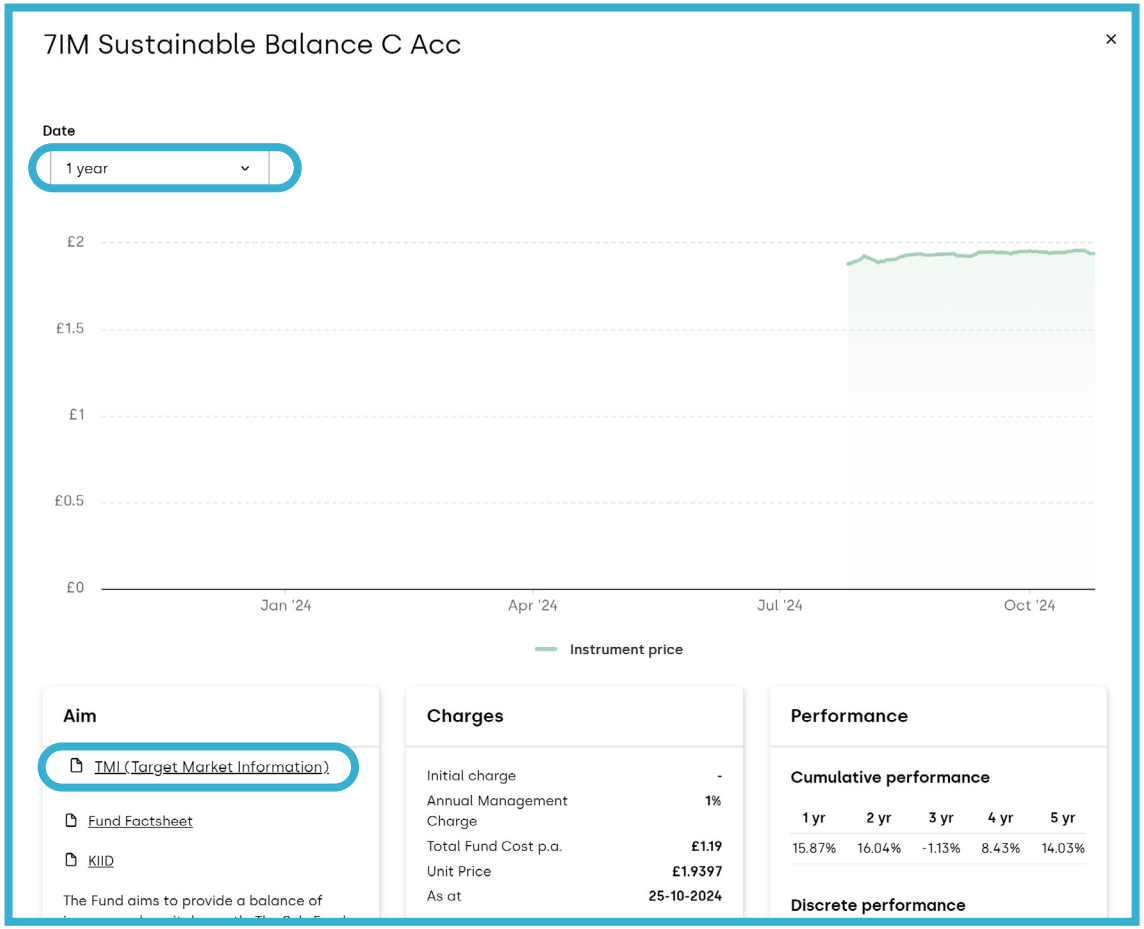
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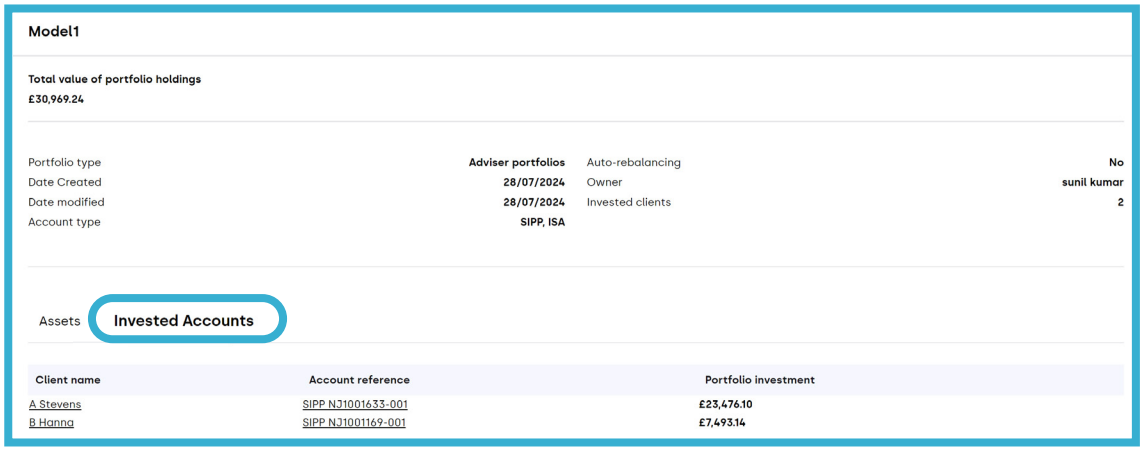


Invested accounts

Select the **'Invested Accounts'** tab.

The investment accounts tab will detail the assets that are part of the portfolio, the portfolio split (%) and tolerance (%).

A list of your firm's clients that are invested in this portfolio, the client's account/wrapper, and investment values will be displayed.



03455 212 414

ask@nucleusfinancial.com

nucleusfinancial.com

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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06/2026