

For advisers

Our new  
platform

# nucleus<sup>o</sup> platform

## How to use the research application

🕒 4 minute read



## How to use the research application

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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

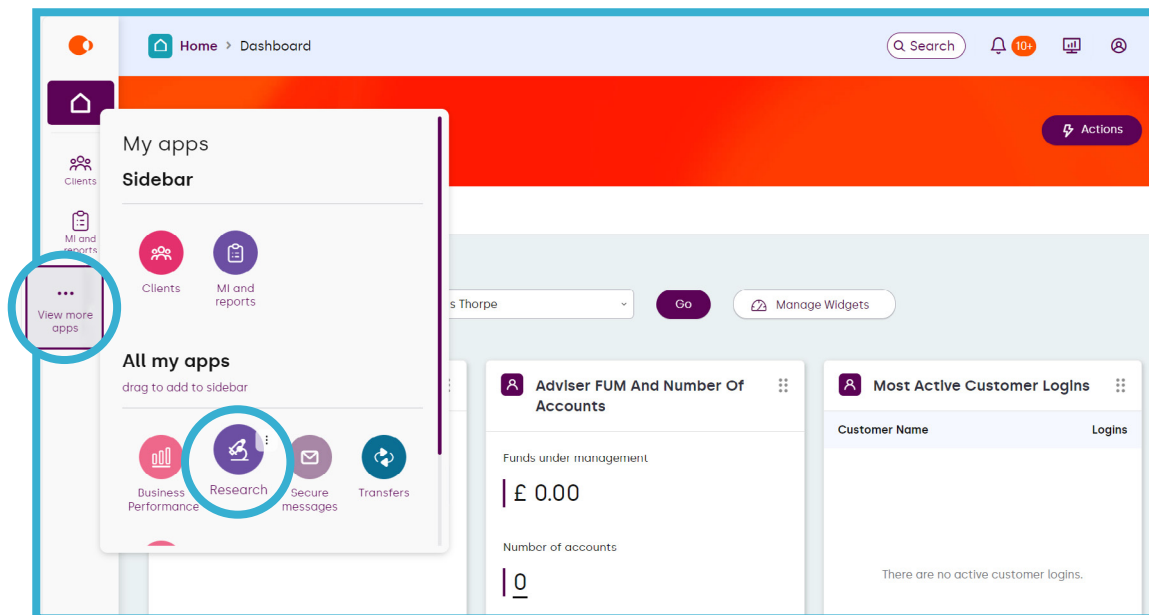
### Key message

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.

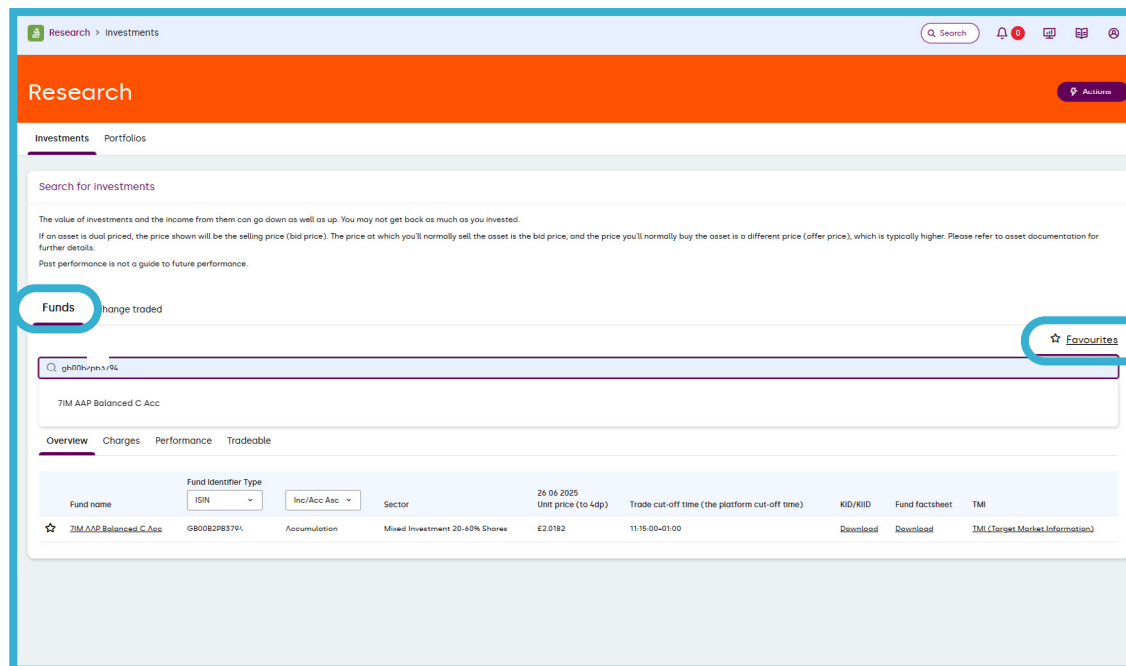
### Key message

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.

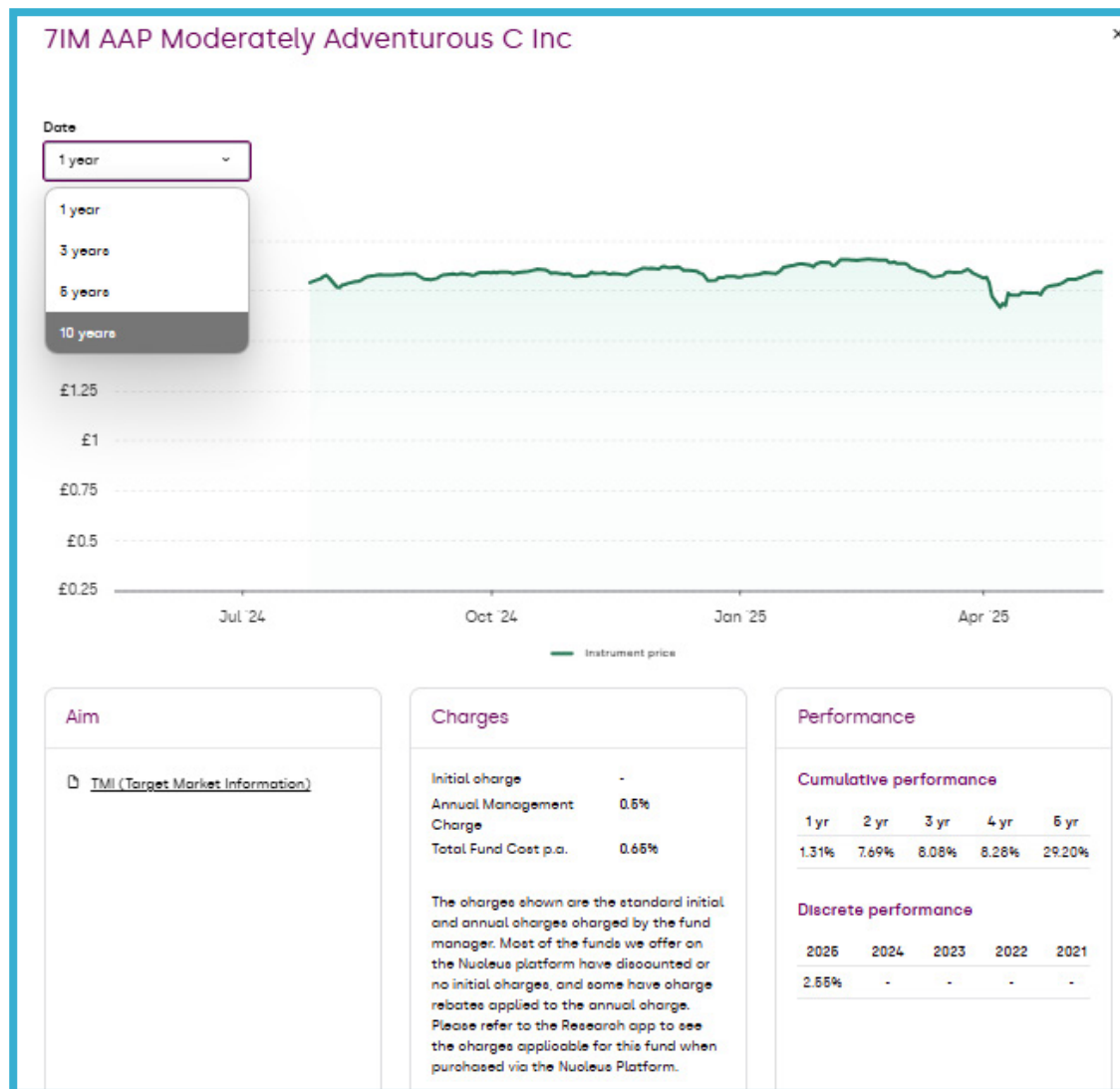
### Key message

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

The screenshot shows a web application interface for filtering investment funds. At the top, there are four dropdown menus: 'Select Investment Manager' (7IM Investment Funds), 'Select sector' (All), 'Select Inc/Acc' (Income fund), and 'Sustainability Label' (All). Below these is a 'Select asset status' dropdown (All) and 'Reset' and 'Search' buttons. A message indicates 'Funds available: 5'. Below this is a navigation bar with tabs for 'Overview', 'Charges', 'Performance', and 'Tradeable'. The 'Charges' tab is selected. The main content is a table with the following columns: Fund name, ISIN, Type (Income or accumulation), Sector, 17 10 2024 Unit price (to 4dp), Trade cut-off time (the platform cut-off time), KID/KIID, Fund factsheet, and TMI. The table lists five funds, each with a star icon, a download link for KID/KIID, a download link for Fund factsheet, and a link for TMI (Target Market Information).

Fund name	ISIN	Type (Income or accumulation)	Sector	17 10 2024 Unit price (to 4dp)	Trade cut-off time (the platform cut-off time)	KID/KIID	Fund factsheet	TMI
☆ 7IM AAP Balanced C Inc	GB00B2PB2V64	Income	-	1.5296€	11:15:00+01:00	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">TMI (Target Market Information)</a>
★ 7IM AAP Moderately Adventurous C Inc	GB00B2PB2K59	Income	-	1.8525€	11:15:00+01:00	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">TMI (Target Market Information)</a>
★ 7IM AAP Moderately Cautious C Inc	GB00B2PB2051	Income	-	1.2195€	11:15:00+01:00	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">TMI (Target Market Information)</a>
☆ 7IM Adventurous C Inc	GB0033957704	Income	-	3.1248€	11:15:00+01:00	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">TMI (Target Market Information)</a>
☆ 7IM Moderately Cautious C Inc	GB0033953273	Income	-	1.4418€	11:15:00+01:00	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">TMI (Target Market Information)</a>

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



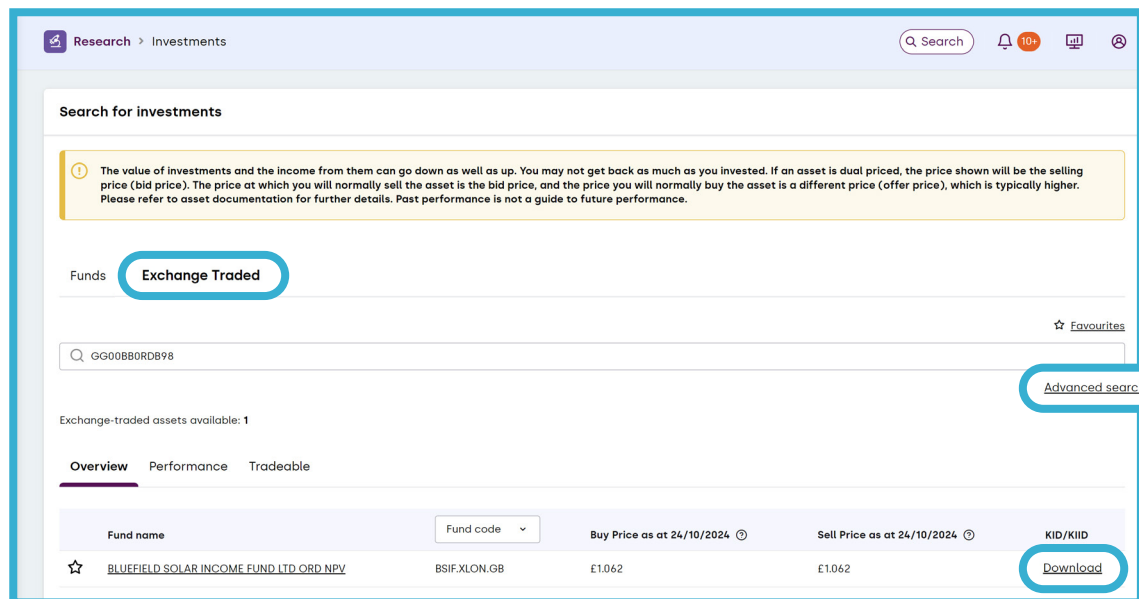
## Exchange traded

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.

Exchange-traded assets available: 767

Fund name	Fund code	Buy Price as at 17/10/2024	Sell Price as at 17/10/2024	KID/KIID
★ SPATIAL PLC ORD GBP010	SPA.XLON.GB	£0.67	£0.67	<a href="#">Download</a>
☆ GROUP ORD GBP0738636	III.XLON.GB	£33.26	£33.26	<a href="#">Download</a>
★ 3I INFRASTRUCTURE PLC ORD NPV	3IN.XLON.GB	£3.32	£3.32	<a href="#">Download</a>
☆ 88 ENERGY LIMITED NPV (D)	88E.XLON.GB	£0.001	£0.001	<a href="#">Download</a>
☆ AB DYNAMICS PLC ORD GBP001	ABDP.XLON.GB	£19.15	£19.15	<a href="#">Download</a>
☆ ABERFORTH SMALLER COMPANIES TRUST ORD GBP001	ASL.XLON.GB	£15.20	£15.20	<a href="#">Download</a>
☆ ABERFORTH SPLIT LEVEL INC TRUST PLC ORD GBP001	ASIT.XLON.GB	£0.00	£0.00	<a href="#">Download</a>

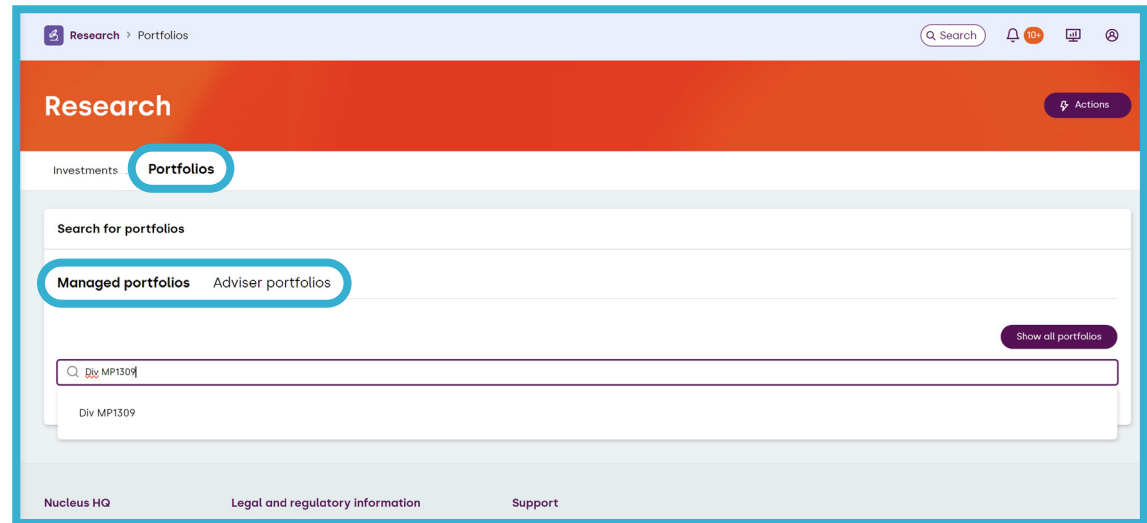
The date range can be filtered from the drop-down (up to a maximum of 10 years).



## Portfolios

Select the **'Portfolios'** tab.

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



## Managed portfolio

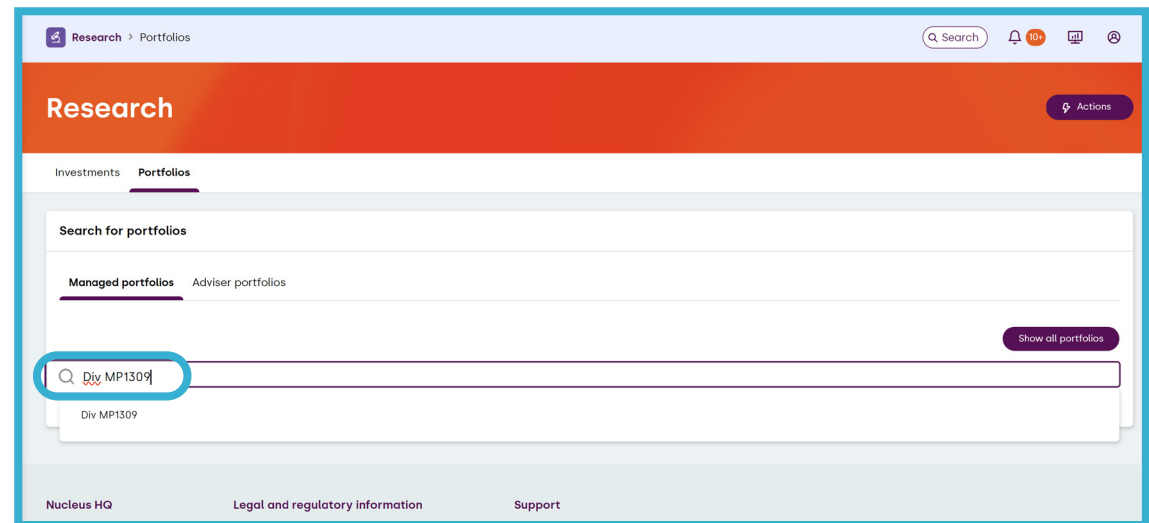
### Key message

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 portfolio please 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.

Search for portfolios

Managed portfolios Adviser portfolios

Search

Basic search

ISA  GIA  Offshore Bond  SIPP or

Reset Search

Managed portfolios available: 70

Portfolio name	Investment manager	Date modified	Product
1012 DM model	Amulya_firm	12/10/2024	SIPP, GIA, ISA, Junior ISA

Search for portfolios

Managed portfolios Adviser portfolios

Search

Basic search

ISA  GIA  Offshore Bond  SIPP or

Reset Search

Managed portfolios available: 2

Portfolio name	Investment manager	Date modified	Product
dim0507	DIM Firm Lucie	05/07/2024	SIPP, GIA, ISA, Junior ISA
dimmodelcharge	DIM Firm Lucie	24/06/2024	SIPP, GIA, ISA, Junior ISA

<< < 1 > >>

Results per page 10

## 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 screenshot shows the 'Details' page for portfolio 'Div MP1309'. The 'Assets' tab is selected, showing a table of assets. The table has three columns: 'Asset', 'Portfolio split (%)', and 'Tolerance (%)'. The asset '7IM AAP Adventurous Acc' is highlighted with a blue circle. The 'Assets' tab label is also circled in blue.

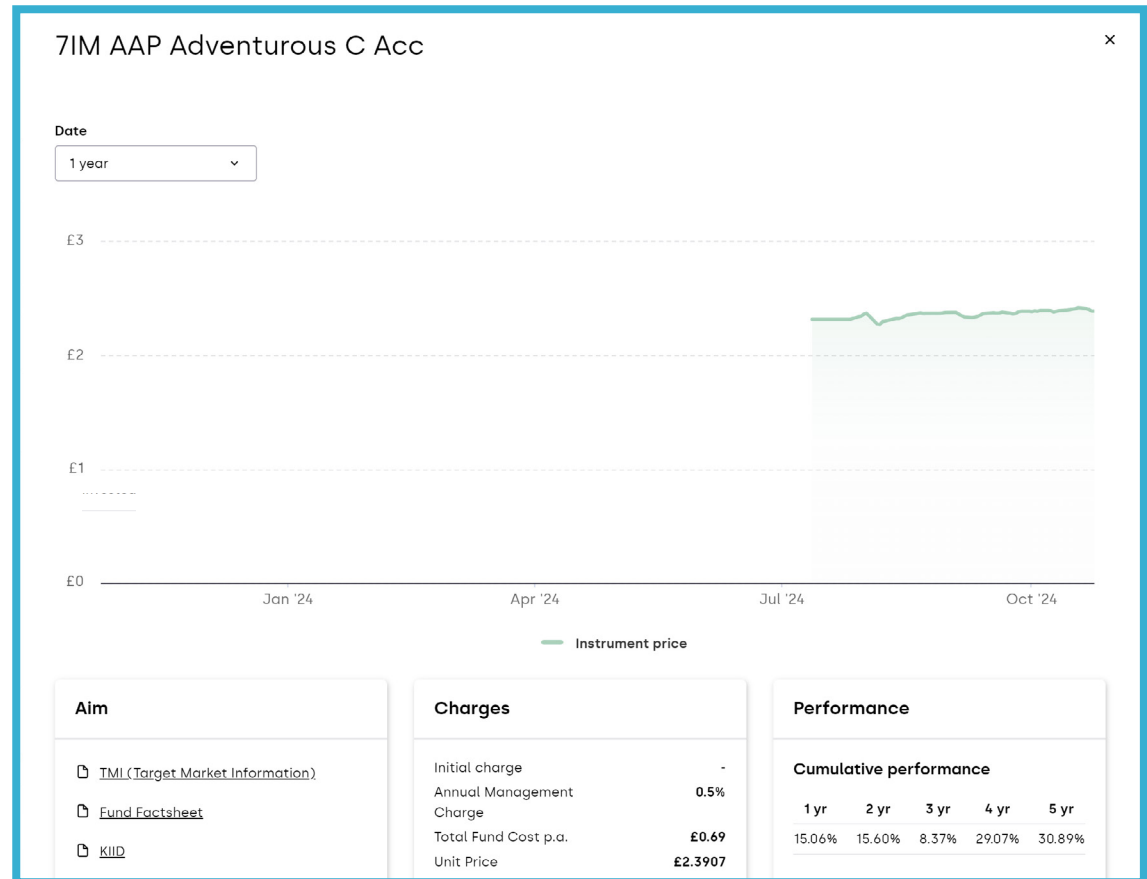
Asset	Portfolio split (%)	Tolerance (%)
<a href="#">7IM AAP Adventurous C Acc</a>	50	1
<a href="#">7IM AAP Adventurous Acc</a>	20	1
<a href="#">7IM AAP Adventurous Acc</a>	30	1

Additional details from the screenshot:

- Portfolio type: Managed portfolios
- Date modified: 10/10/2023
- Account type: SIPP, GIA, ISA, Junior ISA
- DIM Firm: Firm0809
- DIM Fee: 0%
- Invested clients: 2
- Documents: Document name: managernote-edited (Action: View)

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.

The screenshot shows the 'Research > Portfolios > Details' page for 'Div MP1309'. The 'Invested Accounts' tab is selected and highlighted with a blue circle. The page displays the following information:

- Total value of portfolio holdings:** £1,079.92
- Portfolio type:** Managed portfolios
- Date modified:** 10/10/2023
- Account type:** SIPP, GIA, ISA, Junior ISA
- DIM Firm:** Firm0809
- DIM Fee:** 0%
- Invested clients:** 2
- Documents:** Document name: managernote-edited (Action: View)

Below the 'Assets' section, the 'Invested Accounts' table is displayed:

Client name	Account reference	Portfolio investment
<a href="#">Example</a>	<a href="#">SIPP NJ1000123-001</a>	£399.92
<a href="#">P Tester</a>	<a href="#">SIPP NJ1000121-001</a>	£680.00

## Adviser portfolios

Select **'Adviser portfolios'**.

### Key message

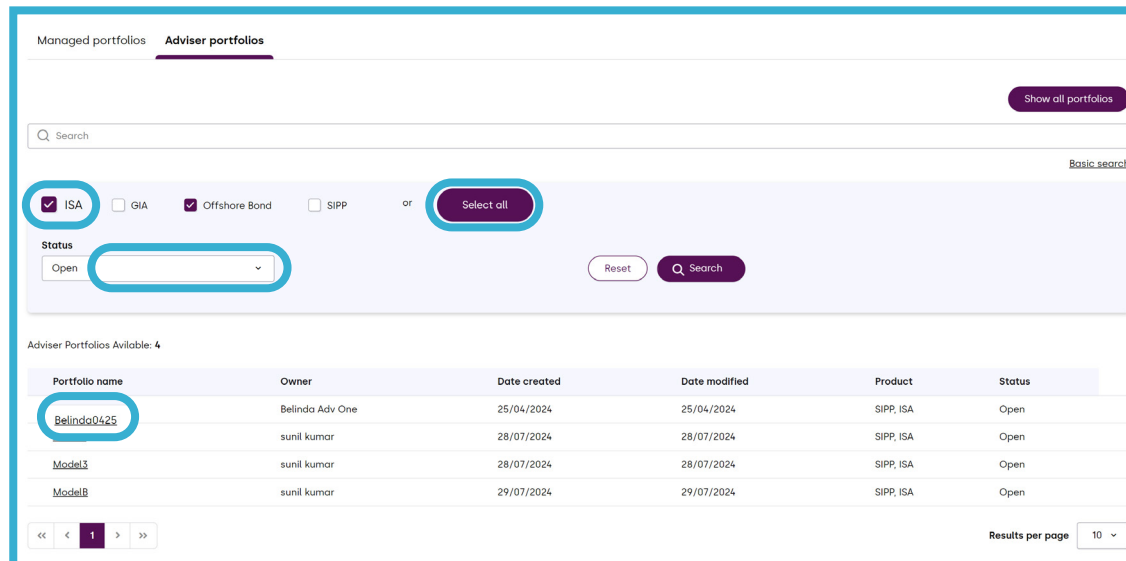
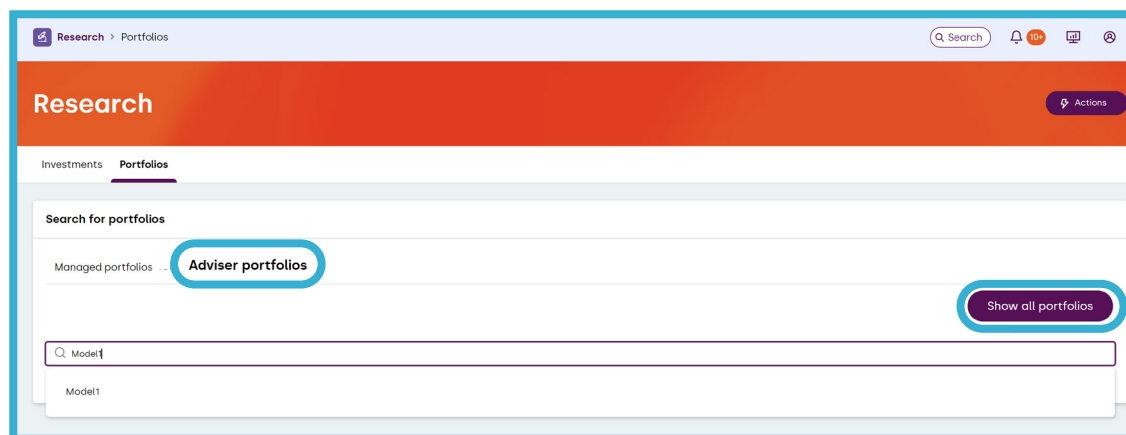
Managed portfolios are created by a fund manager (DFM), and adviser portfolios by the adviser.

### 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.

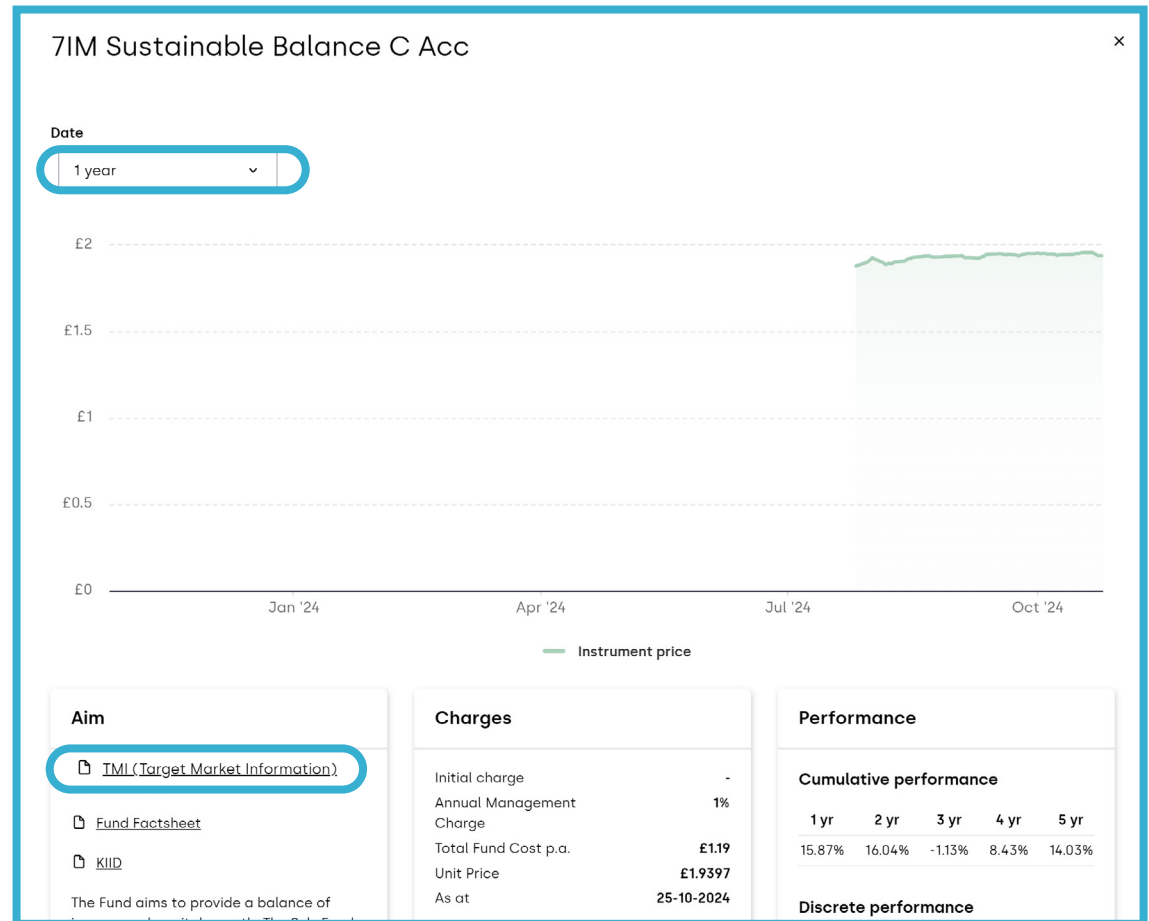
The assets tab will detail the assets that are part of the portfolio, the portfolio split (%) and tolerance (%).

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

Model1			
Total value of portfolio holdings £30,969.24			
Portfolio type	Adviser portfolios	Auto-rebalancing	No
Date Created	28/07/2024	Owner	sunil kumar
Date modified	28/07/2024	Invested clients	2
Account type	SIPP, ISA		
<b>Assets</b> Invested Accounts			
Asset	Portfolio split (%)	Tolerance (%)	
<a href="#">ZIM AAP Moderately Cautious C Inc</a>	5	0	
<a href="#">ZIM AAP Moderately Cautious C Acc</a>	5	0	
<a href="#">ZIM AAP Balanced C Inc</a>	5	0	
<a href="#">ZIM AAP Adventurous C Acc</a>	5	0	
GBP Cash	50	0	
<a href="#">ZIM Sustainable Balance C Acc</a>	5	0	
<a href="#">ZIM Balanced C Acc</a>	5	0	
<a href="#">ZIM AAP Income Acc -U</a>	5	0	
<a href="#">ZIM Moderately Cautious C Acc</a>	5	0	
<a href="#">ZIM Moderately Cautious C Inc</a>	5	0	

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.

**Model1**

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**Total value of portfolio holdings**  
£30,969.24

---


Portfolio type	<b>Adviser portfolios</b>	Auto-rebalancing		<b>No</b>
Date Created	28/07/2024	Owner		sunil kumar
Date modified	28/07/2024	Invested clients		2
Account type	SIPP, ISA			


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Assets Invested Accounts

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Client name	Account reference	Portfolio investment
<a href="#">A Stevens</a>	<a href="#">SIPP N31001633-001</a>	£23,476.10
<a href="#">B Hanna</a>	<a href="#">SIPP N31001169-001</a>	£7,493.14

 03455 212 414

 [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)

 [nucleusfinancial.com](https://nucleusfinancial.com)

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