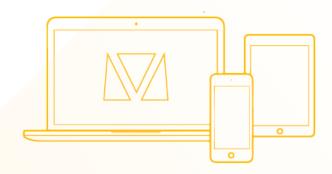


# The go-to place when advising on tax-advantaged investments



Features guide – January 2025



# SEARCH, FILTER, COMPARE & MONITOR







#### Search through hundreds of EIS, SEIS, SITR, BR & VCT investments in one place





### Easily apply filters

to quickly refine and then save clientspecific searches



## You can **compare investments** side by side and **save your comparisons** for each client

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Monitor investments to receive in-site and email notifications on key updates

Fund updated [18 May 2020] The close date for MICAP Ventures has been extended to 30 November 2020.



### **CREATE SAMPLE PORTFOLIOS**





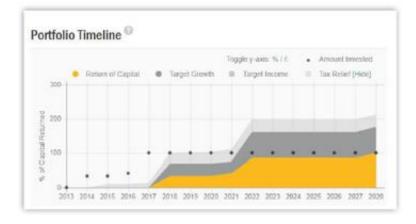
#### Create sample portfolios

of investments adding real value to client meetings

See an analysis of your portfolios including all **blended charges** 

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#### Our **portfolio timeline** illustrates when tax reliefs and investment returns can be expected

View a breakdown of your portfolio by **nine key metrics** 





### A FULL AUDIT TRAIL



# An activity log of all your research (including all views, downloads, filters, comparisons etc.) is automatically saved

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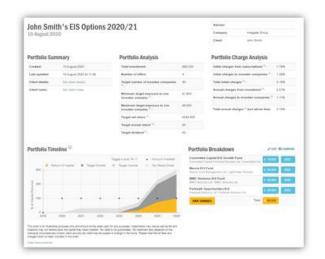
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We personalise and time stamp all documentation so you have a clear audit trail

## All research can be saved to pdf or printed





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## Assign research to one or more client folders

All client research is **frozen** to reflect the data on MICAP **at the date you accessed it** 

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# You can even add your **own notes** to each investment, or to any portfolios, comparisons and filters you create



# DATA, SCORES, REVIEWS & DOWNLOADS



## Access well-presented, detailed and up-to-date data on each investment

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**75+ data points** on each investment



High Impact 7 8

#### All investments are **scored** using our proprietary Impact Assessment scoring system

#### **Sort or filter** investments by their **Impact Scores** to distil the market



#### **Download** comprehensive and **independent reviews** on investments and their managers





#### Download the latest investment documents and application forms

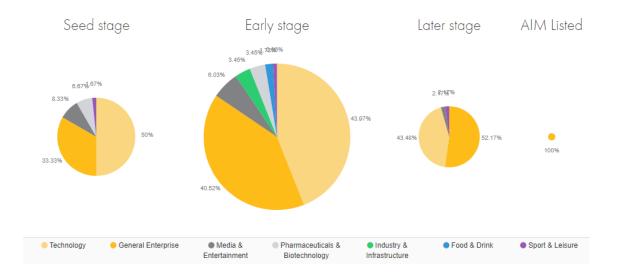




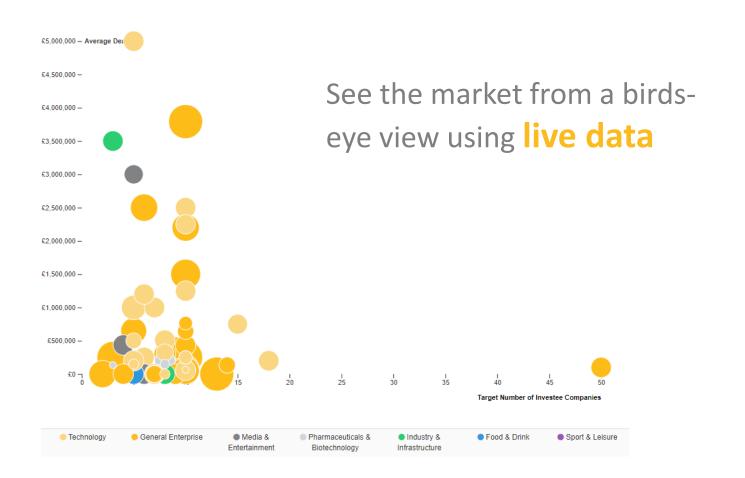
### **MARKET SNAPSHOTS**



#### Access market-leading **data visualisation** on the Business Relief, EIS and VCT markets



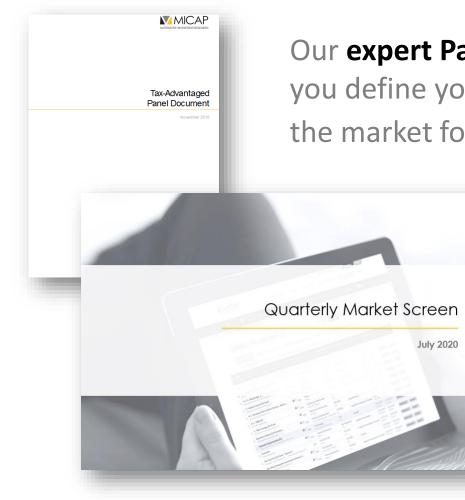






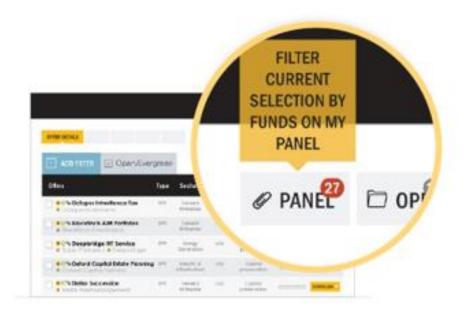
## PANEL SUPPORT SERVICES





#### Our expert Panel Consultants will help you define your panel criteria and screen the market for you each quarter





## Your panel can be easily communicated via the MICAP Fund Finder





## All data can be **exported** or **integrated** with back-office systems



### **NEXT STEPS**



#### **Next steps**







Book a 20 minutes online demo by emailing sam.michie@micap.com Get a FREE trial at www.micap.com/ getstarted Contact your dedicated Relationship Manager on **02033751728** 

# MICAP is the go-to place for advisers considering tax-advantaged investments

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Alternative and unquoted investments are inherently high risk and invested capital is at risk. Tax ramifications may vary depending on the investor's personal circumstances. Please consult our full risk warning on our site for more information.

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