



Alternative Investment Insight through
Research, Training and Increased Efficiency

AI Insight Suite of Services

AI Insight is known as the independent source for alternative investment research, training and compliance documentation. Use our comprehensive platform to monitor performance of hundreds of alternative investments, including alternative mutual funds.



Product, Sector/Structure and Continuing Education Training

Get product-specific training on the features, risks and suitability for hundreds of offerings. Facilitate your firm's Annual Compliance Meeting and Firm Element requirements with our extensive course library.



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Create efficiencies in your due diligence review process using our robust database to source new products as well as analyze and compare hundreds of alternative investment programs, including alternative mutual funds.



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Access performance summaries, generate financial charts and create customizable alerts for performance parameters for non-traded REITs, BDCs and Closed-End Interval Funds. Review performance information from financial filings during and after the offering period.



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Review historical data for non-traded REITs, BDCs, Closed-End Interval Funds, Private Placements and Alternative Mutual Funds. Keep watch on trends using our extensive review of available programs providing key financial statistics for each industry and program, such as distributions and coverage ratios, sector allocations, capital raise, leverage ratios and more.



Consulting Relationships

Many financial firms find themselves lacking resources or expertise on all types of Alternative Investments. Our team has extensive industry experience to provide your firm with complimentary or additional support for your due diligence team.



Compliance Documentation

Demonstrate what you're doing to support your firm's regulatory requirements in a transparent way. AI Insight captures all of the activity your firm members complete within the platform including training modules, offering document reviews and research conducted.

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