



Financial Performance Reporting Tools

Alternative Investment Insight through Research, Training and Increased Efficiency

- **Conduct unbiased performance reporting and perform comparisons.**
- **Aggregate various financial data points to analyze and fulfill ongoing monitoring requirements for offerings available on your platform.**

Access these easy-to-use support tools to:



- **Access hard-to-find key financial metrics** and financial performance summaries for hundreds of alternative investment offerings.
- **Review alternative investment trends** and historical market data for Private Placements, Non-Traded REITs, BDCs, and Closed-End Funds, and Alternative Mutual Funds.
- **Compare performance** using customizable charts and spreadsheets.
- **Generate financial charts** and create customizable alerts for performance metrics most important to you.

Create efficiencies in your business with these benefits:



- **See how the programs on your platform compare** to the industry and peers' programs to determine gaps, or potentially where you may want to add/reduce offerings within certain sectors.
- **Customize packaged reports** that combine the Industry Report with snapshots for the programs most important to you.
- **Easily review summarized performance information** from financial filings—both during and after the offering period.
- **Export information** directly to spreadsheets to add your own data or commentary.



www.aiinsight.com

Request a live tour of our Financial Performance Reporting tool featuring Industry Reports customized to your business needs.

Call us at (877) 794-9448 ext. 710 or send us an email at sales@aiinsight.com.



Financial Performance Reporting Tools

Alternative Investment Insight through Research, Training and Increased Efficiency

- Industry Reports
- Program Reports
- Create Charts
- Create Spreadsheets
- Create Alerts

Industry reports aggregates program specific information into a comprehensive consolidated report. This screen allows the user to view the industry report, a quick reference matrix and even create larger reports that combine the industry report with individual program snapshots. These options are available for REITs (quarterly), BDCs (quarterly), CEFs (semi-annually), AMFs (semi-annually) and Private Placements (monthly). Available reports will appear below after being created and published following each reporting period.

Year: Report:

Create Report

Public Non-Traded REITs	Period	Report
Industry Insights	Q4 2018	View
	Q3 2018	View
	Q2 2018	View
	Q1 2018	View
Industry Grid	Q4 2018	View
	Q3 2018	View
	Q2 2018	View
	Q1 2018	View
Public Non-Traded BDCs		
Industry Insights	Q3 2018	View
	Q2 2018	View
Industry Grid	Q3 2018	View
	Q2 2018	View
Public Non-Traded CEFs		
Industry Insights	Q2 2018	View
Industry Grid	Q2 2018	View
Alternative Mutual Funds		
Industry Insights	Q2 2018	View
	Q1 2018	View
Industry Grid	Q2 2018	View
	Q1 2018	View
Private Placements		
Industry Insights	Dec 2018	View

Industry Reports tab

- Click *View* to see a default report by structure.
- Click *Create Report* to build your own customized report.

Program Reports tab

- View a snapshot or full Financial Performance Summary report.

Create Charts and Create Spreadsheets tabs

- Compare offerings based on criteria and time periods you choose.

Create Alerts tab

- Set alerts to track important data, such as Impairments or Litigation notifications for offerings available on your platform.