



Alternative Mutual Fund Research

Alternative Investment Insight through
Research, Training and Increased Efficiency

Both the SEC and FINRA have published notices about the complexities of alternative mutual funds. Use AI Insight's Alternative Mutual Fund Research to help you understand and apply liquid alternatives in your practice.



Research

Review independent, unbiased reports addressing the breadth and diversity of alternative mutual funds as well as differences across the underlying strategies. Use robust tools to perform detailed fee analysis, run side-by-side fund comparisons and receive ongoing fund updates.



Education

Access comprehensive education modules that cover the key features, risks and considerations of alternative strategy mutual funds.



Compliance Documentation

The AI Insight platform serves as a documentation protocol to support regulatory-compliance requirements. Our Training, Education and Research Log automatically tracks all activity conducted on the platform for these purposes.

Target Fund Criteria

The initial universe consists of mutual funds with:

- An alternative strategy,
- A 3-year track record, and
- \$500 million in assets under management.

We will continue to expand coverage while also considering subscriber requests.



Request a live tour and ask about AI Insight subscription options:

- **Call us at (877) 794-9448 ext. 710**
- **Send us an email at riskmanagement@aiinsight.com**

AI Insight created an enhanced framework for understanding the Alternative Mutual Fund industry.

Our alternatives-centric strategy provides comprehensive information covering investment methods to help you apply liquid alternatives in your practice.

Conduct Research



Use thorough reports to efficiently research an aggregation of insightful quantitative and qualitative data including fund company, strategy, portfolio and investment advisor overviews.

Understand Fund Strategies



Our alternative-centered focus provides research on various strategies including managed futures, long-short, market neutral and alternative allocation.

Track Performance



Stay up-to-date on ongoing performance with portfolio-oriented peer groups and strategy-based benchmarks for performance comparison insight.

Grow Your Business



Use robust tools, expand your knowledge, and track your due diligence efforts to more confidently identify and apply alternative investment solutions for clients.



www.aiinsight.com

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