



Financial Performance Reporting Tool featuring Industry Reports

Alternative Investment Insight through Research, Training and Increased Efficiency

Aggregating various financial data points to analyze and fulfill ongoing monitoring requirements for offerings available on your platform is an extensive process. AI Insight's Industry Reports can help you:



Easily access hard-to-find key financial statistics for each industry and program, such as distributions and coverage ratios, sector allocations, capital raise, leverage ratios and more.



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.



Meet regulatory requirements set forth by FINRA RN 12-03 by conducting ongoing reviews of complex products on your platform.

Get unbiased updates on key performance metrics for hundreds of funds including:

- Alternative Mutual Funds
- Non-Traded BDCs
- Closed-End Interval Funds
- Non-Traded REITs
- Private Placements (including 1031s and Opportunity Zones)



Request a live tour and ask about AI Insight subscription options at aiinsight.com or call 877-794-9448 ext. 710.



Financial Performance Reporting Tool featuring Industry Reports

Alternative Investment Insight through Research, Training and Increased Efficiency

Request a live tour and ask about AI Insight subscription options at aiinsight.com or call 877-794-9448 ext. 710.