

# Performance Reporting: Beyond GIPS®

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# What types of performance reporting are provided by firms and asset owners?



**Internal Reporting**



**External Reporting**



**Peer Analysis**



**Use of MWRs**

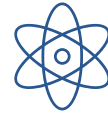


**Procurement of Reporting Services**

# What types of challenges and controls exist around the distribution of performance?



**Multiple Return Streams for a Single Product**



**Challenges with the New SEC Marketing Rule**



**Review of Marketing Materials**



**Databases**

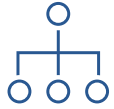


**Using the Proper Return Stream**



**Supplemental Information**

# What are the challenges and solutions related to systems, especially those without sophisticated reporting functionality?



**Overcoming Performance System Reporting Limitations**



**New SEC's Marketing Rule Impact on Software Providers**



**Data Issues**



**Outsourcing Challenges**



**Use of AI In Reporting**

# Questions?

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