

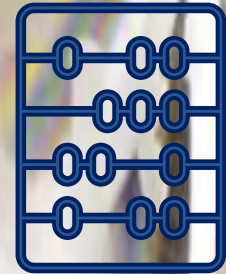
**Frances Barney, CFA,
BNY Mellon**

**Shankar Venkatraman, CFA, FRM
American Century**

**Alex Shafran, CFA,
Cohen & Steers**

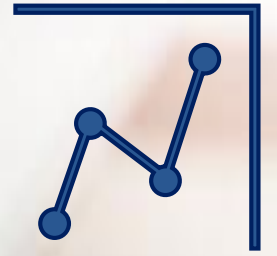
**Patrick W. Fowler, TSG
Moderator**

Performance Reporting





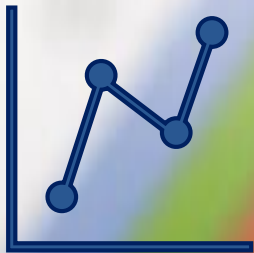
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Performance Reporting

- What type of performance reporting are you currently doing?
- What tools and mediums are you using for producing and disseminating performance reporting?
- What are compliance and data licensing considerations in performance reporting?



Education / Tracking and Production

- How do you educate users and report recipients on the content and the scope of reporting available to them?
- Do you track and produce any process or usage metrics for reporting and if yes, how is it being used?
- What are the new types of performance reporting requests that you observed more recently?



Success Stories / AI Trends

- Reporting Efficiencies Success Stories.
- Why are not we using AI more in performance reporting now?



Q & A

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