



Release Notes 23.06

January 9th, 2024



DOCUMENT VERSION CONTROL

| Version | Comments | Author | Date |
|---------|---------------|--------------------|------------|
| 0.1 | Draft Version | Kunaljit Nath | 12/26/2023 |
| 0.2 | Final Version | Brett Schechterman | 01/08/2023 |

RACI MATRIX

R - Responsible, A - Accountable, C - Consulted, I - Informed

| | Tarun Goud | Brett Schechterman | Brian Moran |
|---------|------------|--------------------|-------------|
| Review | A | A | I |
| Approve | C | A | A |

INTRODUCTION

This document outlines and provides foundational context to the latest enhancements to the FLX Networks community platform introduced in release 23.06. This release delivers significant user interface and platform navigation enhancements along with meaningful content enrichment/curation and automated ingestion capabilities.

Notable enhancements include the new design / layout of the dashboard (hereafter known as Launchpad) and FLX Insights v1.5. Additionally, we have collaborated with partners to further optimize performance and user experience / content rendering for FLX TV and FLX Casts. This release also sets the stage for our content ingestion and automation plans, allowing us to retire manual workflows and data maintenance around Insights content. Finally, this release delivers our initial SSO integration with a Solutions partner.

IMPACTED USERS

| Impacted Persona(s) | Impacted Section | Functionality |
|--------------------------------|---------------------------|---|
| ALL | Dashboard FLX Insights | New Dashboard / Renamed to Launchpad Permissions / Redesign |
| ALL | My Profile: “Top Stories” | Section removed, as content has been migrated to new Launchpad |
| WME | Audit Log | All logs under Audit log |
| ALL | FLX TV & FLX Casts | Enhanced rendering and performance |
| AM / Distribution Professional | Member Onboarding | Changes to self-signup integration (similar to AE). Additional changes expected due to new public website launch and integration of Cognito forms to manage inquiries / requests. |

RELEASE SCOPE DETAILS

The scope of the release includes the following items:

| Platform Category | Feature | Description / Details |
|---|----------------------------|--|
| UI / UX | Renaming of Dashboard page | The Dashboard has been renamed to Launchpad for all users. |
| UI / UX, Platform Navigation & Content | New Launchpad | The dashboard underwent a comprehensive redesign that includes content and navigation enrichment. Components include the following: <ul style="list-style-type: none"> Featured Investment Insights FLX Community Insights offers Quick Links to FLX TV and FLX Casts content. |

| | | |
|---|-----------------------|--|
| | | <ul style="list-style-type: none"> Dedicated section for FLX solutions, providing swift access to focus solutions. Two new sections for the News Feed have been introduced, both tailored to display group-specific channels. |
| UI / UX, Platform Navigation & Content | New FLX Insights Page | <p>The Insights page has undergone a total redesign, with revamped layout, media library navigation filters and tags.</p> <ul style="list-style-type: none"> A new Featured Insights section has also been introduced to align with FLX Intelligence Roundup. |
| UI / UX - FLX Media | FLX TV & FLX Casts | Partnered with Spotlightr to optimize performance and to enhance how video content renders within the UI. |
| UI - Member Profile | Top Stories. | Section removed, as content has been migrated to new Launchpad |
| WME - Audit Log | All Logs. | The issue of null creation dates for certain older records has been addressed. |
| Member Onboarding - DP | Self-Signup Forms. | DP personas can be automatically created. |

Launchpad Components

Investment Insights

Investment Insights:

- Aggregated Insights content from our manager universe automatically scraped and surfaced. Manager name and published time stamp visible on each tile.
- Scrolling option and drop-down menus by Insight "Type" and "Date" allow users to simply and quickly filter content directly without navigating to separate pages.
- "All Insights" button provides another quick link to navigate to the new FLX Intelligence Insights home page

Launchpad

My Profile

Investments

Intelligence

Solutions

Store

FLX Community

Salesforce

Upload Zone

Featured Investment Insights

Type

White Paper

All time

30 Days

60 Days

90 Days

Full Insights

A Picture Is Worth 1,000 Words – November 2023

1 A PICTURE IS WORTH 1000 WORDS We have written a n

18 months arguing that the small and microcap markets ar

time we decided to simply provide a series of charts and c

undervalued we believe it is and, therefore, how much ups

Go to article

180 Degree Capital Corp • 2 M

When Diversification Fails

Financial Analysts Journal |. A Publication of. CFA Institute, Perspectives, CE Credits: 0.5.

Volume 74 Number 3 © 2018 CFA Institute. 19 When Diversification. Fails. Sébastien

Page, CFA, and Robert A. Panariello, CFA Sébastien Page, CFA, is head of Global Multi-

Asset and member of the Management Committee at T. Rowe Price, Baltimore. Robert ...

Go to article

Empirical Asset Management LLC • 2 M

Investment Insights:

Drop-down menus by "Type" allows users to filter content dynamically and interactively.

FLX Community Insights

FLX NETWORKS

Launchpad

My Profile

Investments

Intelligence

Solutions

Store

FLX Community

Salesforce

Upload Zone

LAUNCHPAD

FLX TEAM Brett Schechterman

FLX Community Insights:

- Aggregated thought leadership and media content from FLX, several FLX partners and industry consultants focused on Asset & Wealth Management – also automatically scraped and surfaced. Manager name and published time stamp visible on each tile.
- Spotlight piece enabling FLX to feature content from FLX Media or any other partners also providing thought leadership for the industry.
- Rather than scrolling, quick links provided to the 3 most recent stories along with buttons to navigate to FLX Media showcases

FLX Community Insights

Source

Date

FLX NETWORKS

2023 AND BEYOND

SPOTLIGHT

FLX 2023 and Beyond Sales

QUICK LINKS

Institutional Channel Assets Gain Slight Edge Over Retail

Cerulli Associates Inc • 15 h

Choosing Your Website Redesign Partner

GK3 Capital LLC • 1 d

ETF Assets Reach New All-Time High

Cerulli Associates Inc • 5 d

Go to FLX TV

Go to FLX Casts

FLX Community Insights:

- Drop-down menus by “Source” and “Date” allow users to simply and quickly filter content directly without navigating to separate pages.
- Icons indicate whether content / media is video, audio or print

FLX Community Insights

Source
FLX Networks

Date

All time

30 Days

60 Days

90 Days

- FLX NETWORKS - Welcome To Your New Network
FLX Networks • 4 w
- BRISTOL GATE Capital Management
FLX Networks • 4 w
- FLX Friday Film Series- GROWTH
FLX Networks • 1 M
- FLX Friday Film Series A NEW APPROACH
FLX Networks • 1 M
- InFLXtion Points- Don't Sell Them, Compel Them with Michael Silver of Fo...
FLX Networks • 2 M
- Bristol Gate Capital Partners
FLX Networks • 2 M
- FLX Friday Film Series THANK YOU
FLX Networks • 2 M
- FLX Friday Film Series- BEING VULNERABLE

FLX Solutions Center

FLX Solutions

ANALYTICS >

Data analysis to manage and grow your business, including ETF, SMA, and Mutual Fund data.

DATA DISTRIBUTION >

Distribution of fund and firm data to 60 global consultant databases.

MEDIA >

Video production and multimedia content to tell your story and enhance engagement.

COACHING & PRACTICE MANAGEMENT

Coaching solutions and engagement for financial advisors, RIAs, wealth management firms, and...

[View all FLX Solutions](#)

SHARED CLIENT ENGAGEMENT >

Personnel, including wholesaling and national account distribution.

PUBLIC RELATIONS >

Brand building and reputation enhancement through credibility and validation.

FLX Solutions Center:

- As with the prior version of the application, we present a section that highlights FLX Solutions in focus with an ability to change the product shelf and configuration as required
- “FLX Solutions” button provides another quick link to navigate directly to the FLX Solutions Exchange home page

FLX Market Intelligence News Channels

| WM Home Office News & Insights | TAMP News & Insights |
|---|--|
| <p>New year nerves: Why we're still optimistic</p> <p>Go to article JP Morgan Private Bank • 4 d</p> | <p>What Moves Markets</p> <p>Go to article Orion Portfolio Solutions • 9 h</p> |
| <p>Sustainable investing</p> <p>Go to article UBS • 5 d</p> | <p>January 2024 Brinker Monthly Update</p> <p>Go to article Orion Portfolio Solutions • 9 h</p> |
| <p>Did the Fed Jump the Gun?</p> <p>Go to article Morgan Stanley • 6 d</p> | <p>The Evolution Of The RIA Space: A Surge Of Professionalization</p> <p>Go to article Dynasty Financial Partners Inc • 5 d</p> |
| <p>TechGPT: Raising AI revenue forecast by 40%</p> <p>Go to article UBS • 1 w</p> | <p>The Weekly Wire: Cherry On Top</p> <p>Go to article Orion Portfolio Solutions • 6 d</p> |
| <p>Positive on global semiconductors</p> <p>Go to article UBS • 3 w</p> | <p>Choosing Technology That Supports Your Business Model and Investment Philosophy</p> <p>Go to article Orion Portfolio Solutions • 7 d</p> |

FLX Market Intelligence News:

- Provides ability to deliver custom news channels configurable at the Group level, meaning we can provide curated content by Firm, Personas and/or Job Functions.

FLX Insights 1.5

Library Navigation

All Insights:

- Aggregated Insights content from our manager universe and FLX Community thought leaders automatically scraped and surfaced.
- Drop-down menus by Insight "Type", "Source" and "Date" allow users to simply and quickly filter content.
- "Topics" that are automatically attached via AI & Machine Learning engine deliver ability to filter library and to run a targeted search. These same "Topic" can be applied or removed directly via the story tiles as well.
- View settings allow users to view the content in "grid" setting (smaller tiles, more stories) vs. "list" setting (larger tiles, one per line)

Type

Source
Astor Investment Management LLC

Date

TOPICS

- ☐ Central Banks 64.3%
- ☐ Inflation 64.3%
- ☐ Wealth Management 57.1%
- ☐ Wealth Management Technology 57.1%
- ☐ Investment Advisory 53.6%
- ☐ Recession 32.1%
- ☐ Federal Reserve Board News 25%
- ☐ Interest Rates 21.4%
- ☐ Dividend News 17.9%
- ☐ Fixed Income 17.9%
- ☐ Earnings News 14.3%
- ☐ Fed Interest Rate Policy 14.3%
- ☐ Treasury Bonds 10.7%
- ☐ Employment 7.1%
- ☐ ETF News 7.1%
- ☐ Equity Indices 7.1%
- ☐ Bond Indices 7.1%
- ☐ Public Debt 7.1%
- ☐ Monetary Policy 7.1%
- ☐ Stock Market Comments 3.6%
- ☐ Artificial Intelligence 3.6%
- ☐ Top Technology Trends 3.6%
- ☐ Credit Market Valuations 3.6%

Apply Filters

Clear Filters

FEATURED

How 2023 Broke Investor Expectations

Argent Capital
Dec 26, 2023, 9:32:59 AM

Ward Brown takes a journey through the unexpected twists of 2023. From dire predictions for a negative year for stocks to the surprising resilience of the economy, he explores the impact of interest rates, labor market dynamics, and other trends. Can the case be made for optimism in 2024? Stay tuned to find out. Transcript Hello, I'm Ward Brown, standing outside the old Tivoli Movie House. I've always liked looking at...

[Read More](#)

196 Results

Monthly Commentary

Astor Investment Management
Jan 8, 2024, 6:43:03 AM

and are subject to change. U.S. ECONOMY UPDATE The Astor Economic Index® (AEI) Our proprietary Astor Economic Index® is up somewhat over the last several weeks though remains at ...

[Read More](#)

Central Banks # Employment # Fixed Income

Add to context

Exclude from context

Replace context

Comprehensive Review of 2023's Economic Moves and a Look Ahead into...

Astor Investment Management
Jan 5, 2024, 1:07:04 PM

Astor's CIO John Eckstein and Portfolio Manager/Vice President - Research, Nick Porter discuss 2023 economic moves and a look ahead into 2024. LISTEN NOW! MAS-M-472157-2023-12-20 Th...

[Read More](#)

December 2023 Update on the U.S. Economy

Astor Investment Management
Dec 20, 2023, 2:06:23 PM

Our last reading of the Astor Economic Index® (AEI) in 2023 places U.S. economic growth in about average territory, up modestly from the beginning of the year as expectations for...

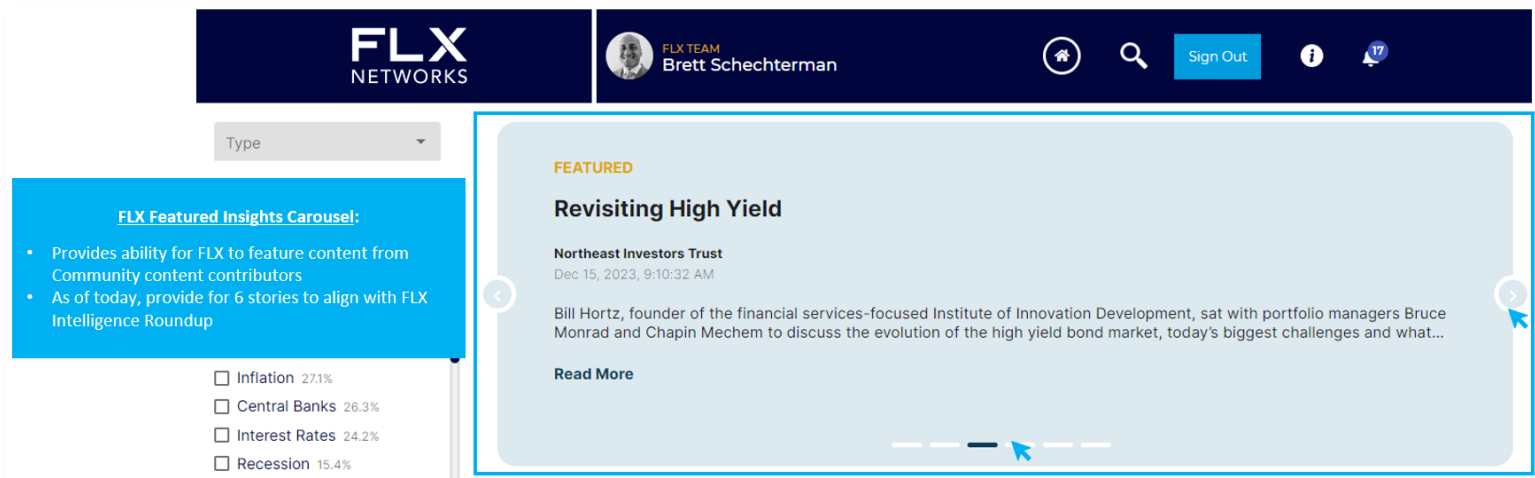
[Read More](#)

Let's Look at Labor, Employment and Payroll Trends

Monthly Commentary

Quarterly Commentary

Insights - Featured Carousel



FLX NETWORKS

FLX TEAM
Brett Schechterman

Sign Out

Type

FLX Featured Insights Carousel:

- Provides ability for FLX to feature content from Community content contributors
- As of today, provide for 6 stories to align with FLX Intelligence Roundup

- ☐ Inflation 27.1%
- ☐ Central Banks 26.3%
- ☐ Interest Rates 24.2%
- ☐ Recession 15.4%

FEATURED

Revisiting High Yield

Northeast Investors Trust
Dec 15, 2023, 9:10:32 AM

Bill Hertz, founder of the financial services-focused Institute of Innovation Development, sat with portfolio managers Bruce Monrad and Chapin Mechem to discuss the evolution of the high yield bond market, today's biggest challenges and what...

[Read More](#)

OPEN ISSUES/LIMITATIONS

Some of the enhancements planned for future releases:

- Additional content review and curation being conducted across FLX Insights sources (ongoing)
- New section will be embedded under WM Company profile called "Home Office News & Insights", enhancing the community page content proposition (to be considered for AM Community Pages as well later in 1H'24)
- FLX Market Intelligence Dashboard & Newsletter capabilities – AI-powered content curation and content generation fully integrated within FLX user experience
- AME admin features (e.g. employee management) will match those provided by WME
- Collection of engagement analytics from Insights navigation and newsletter engagement
- Upgrades to following notifications and email preference granularity

END OF DOCUMENT