



# Release Notes 24.07

June 13<sup>th</sup>, 2024



## DOCUMENT VERSION CONTROL

Version	Comments	Author	Date
0.1	Draft Version	Kunaljit Nath	06/11/2024
0.2	Draft Version	Brett Schechterman	6/13/2024

## 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 the latest enhancements to the FLX Networks community platform introduced in release 24.07. Notable enhancements include the enablement of personalized intelligence for both Launchpad and FLX AI and the roll-out of Engagement Analytics for asset manager insights.

## IMPACTED USERS

Impacted Persona(s)	Impacted Section	Functionality
All	Launchpad & FLX AI	Content channels can now be customized for specific member tiers, providing users with intelligence tailored to their preferences for a more personalized experience. This is available for both Launchpad and FLX AI channel assignments.  Significant processing enhancements delivered for FLX AI based on the OpenAI model upgrade and optimized pre-canned prompts.
Asset Managers	Reporting	Engagement Analytics for Insights is now available, providing Asset Managers with enhanced lead generation by tracking FLX member activity associated with their news and thought leadership.
Asset Managers	Company Profile	We have updated asset class / expertise values and segregated a new section called Product Offerings that will enhance investment exchange discoverability and more closely aligns with our next generation design layout.
Wealth Managers	Company Profile	Formatting updates to the Company Profile and Platform Update entry requirements.

## RELEASE SCOPE DETAILS

The scope of the release includes the following items:

Platform Category	Feature	Description / Details
Launchpad	News and Insights	Specific content channels can now be assigned to users, allowing for a more tailored intelligence experience. By customizing the channels to match individual preferences, users can stay informed

		about the subjects that matter most to them while saving time, enhancing their overall experience and engagement with the platform. Importantly, this experience will also extend to the mobile experience we will be delivering next month.
AM Community Pages	Reporting → Engagement Analytics	Engagement Analytics for Insights is now available, offering Asset Managers enhanced lead gen capabilities alongside what we already offer through company profile and product content engagement.
AM Community Pages	Company Profile	A new section called Product Offerings has been added, providing Asset Managers with the opportunity to showcase their product vehicle shelf more clearly. We have enriched / updated the Expertise section, but this will more clearly focus on asset class / strategies. Ultimately, these changes are meant to streamline investment exchange navigation and searchability.
WM Community Pages	Company Profile & Platform Updates	<p>Character limit for "About Us" has been removed, allowing Wealth Firms to leverage the section to provide more context to their asset manager partners.</p> <p>For Platform Update entries, 'Platform' and 'Product Structure' are no longer required fields providing more flexibility to accommodate more general partner update entries.</p>
FLX AI	UX, Model Upgrade and Prompt Optimization	<p>FLX AI has been redesigned to optimize available screen space, enhancing user experience. The new layout allows users to navigate more efficiently and make better use of their display to execute filtering and content creation workflows.</p> <p>We have upgraded to OpenAI's latest model, "GPT-4o" ("o" = "omni"). We have also optimized our pre-canned prompt library and as a result of both upgrades are observing a vast improvement in the processing power (# of stories), depth, and quality of the responses generated.</p>

## Other notable features addressed in this release:

- **Upload Zone removal:** Given the significant upgrades to our automated intelligence ingested capabilities, the Upload Zone has been removed from Asset Manager Community Pages.
- **Navigation Updates:** When selecting 'FLX Store', rather than navigating within the same browser tab, it will automatically launch a new tab. We have also provided the same journey for when users click on URLs that have been embedded within WME Platform Updates.

# FLX AI - Full Screen Layout & New Prompt Menu

FLX NETWORKS

FLX AI

FLX TEAM  
Kunaljit Nath KN

Version 3.2024.515

SEARCH

LOGOUT

Asset Management Industry Pulse

2024-03-06 to 2024-06-0

Channels and Filters

Channels

Topic

Source

Clear Filters

News

Illinois Municipal Retirement Fund Approves \$282.5 Million in Commitments to Four Alternatives Managers

Five commitments in total were approved to AUA Private Equity Partners, Inflexion, Sterling Group and H.I.G Capital Partners.

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# Company Websites
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+ 10 Others

Chief Investment Officer • 25 m

Morningstar names new global head of manager research

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# Business & Financial Publications
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# Management
+ 2 Others

Citywire • 2 h

Fund Files: Cap Group shakes up PMs on \$2.7bn fund

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# Business & Financial Publications
# News
# English
+ 2 Others

Citywire • 2 h

AI Summary

Analytics - Mentions

Analytics - Media Coverage

Analytics - Word Cloud

Prompt Options

Prompt Mode

Popular prompts

One Sentence Summaries

Bullet Headlines

Business Briefing

Number of articles used 10

Use full articles

Generate AI Response

Response

Share

AI Summary

Analytics - Mentions

Analytics - Media Coverage

Analytics - Word Cloud

Prompt Options

Prompt Mode

Popular prompts

One Sentence Summaries

Bullet Headlines

Business Briefing

500 Word Summary ("Meal")

300 Word Summary ("Snack")

100 Word Summary ("Bite")

Newsletter Summary

Brief Earnings Summary

Detailed Earnings Summary

Newsletter Preamble

Number of articles used 10

Use full articles

Generate AI Response

# AM Community Pages - Product Offerings

eric

1

COMPANY PROFILE

PRODUCTS

REPORTING

LEGAL

ADMIN

Profile

**Firm Overview:**  
*AIS challenges conventional thinking*, elevating *income* as a key objective for individuals with wealth. We believe that *income* should be a critical portfolio component throughout the portfolio lifecycle to ensure predictable growth in the *investment* phase, significant income in the *reinvestment* phase, and reliable liquidity in the *annuitization* phase.  
 Alternative Income Solutions, LLC (AIS) was founded in 2019 to provide a source of uncorrelated income to Financial Advisors and their clients. We are a highly experienced team that provides access to rare income-generating investment strategies that share three core attributes:  
 -Significant & predictable income  
 -Little or no correlation to major market indices  
 -Low risk of capital loss  
**Firm Key Differentiators:**  
 Access to specialist lending and finance strategies. Our target is to deliver 8-10% net returns to the investor who may select a 1875% quarterly distribution. AIS foundation fund is uncorrelated to major market indices and all strategies have collateral protection and generate income.  
**Firm AUM:**  
 ~\$25 mln

Expertise

**Alternative**  
 Blockchain  
 Equity Hedge - Market Neutral  
 Fund of Hedge Funds

**International Equity**  
 Diversified Emerging Markets  
 India Equity  
 Japan Stock

**Money Market**  
 Non-40 Act  
 Prime Money Market

**Taxable Bond**  
 Emerging-Markets Bond  
 Preferred Stock

Product Offerings

Active ETF  
 CIT  
 Closed End Fund  
 ESG  
 Non-Transparent Active ETF  
 Passive ETF

Availability

[Add Availability](#)

Contact

**ADDRESS**  
**Location:**  
 State: Connecticut  
 Phone: +1 (647) 949-0942  
 Company Email: eric.am3@mailinator.com  
 Company URL: https://www.goodie.com

**Social**  
[in](#) [f](#)

**Search Profile**  
☐ Show your profile in search results.

**Email Preferences**  
☐ Turn off your email notifications

# Engagement Analytics

eric

1

COMPANY PROFILE

PRODUCTS

REPORTING

OTHER

ACTIVITY

ENGAGEMENT ANALYTICS

PROFILE

ASSET MANAGER

eric

Version 3.2024.6.11

SEARCH

LOGOUT

INSIGHTS

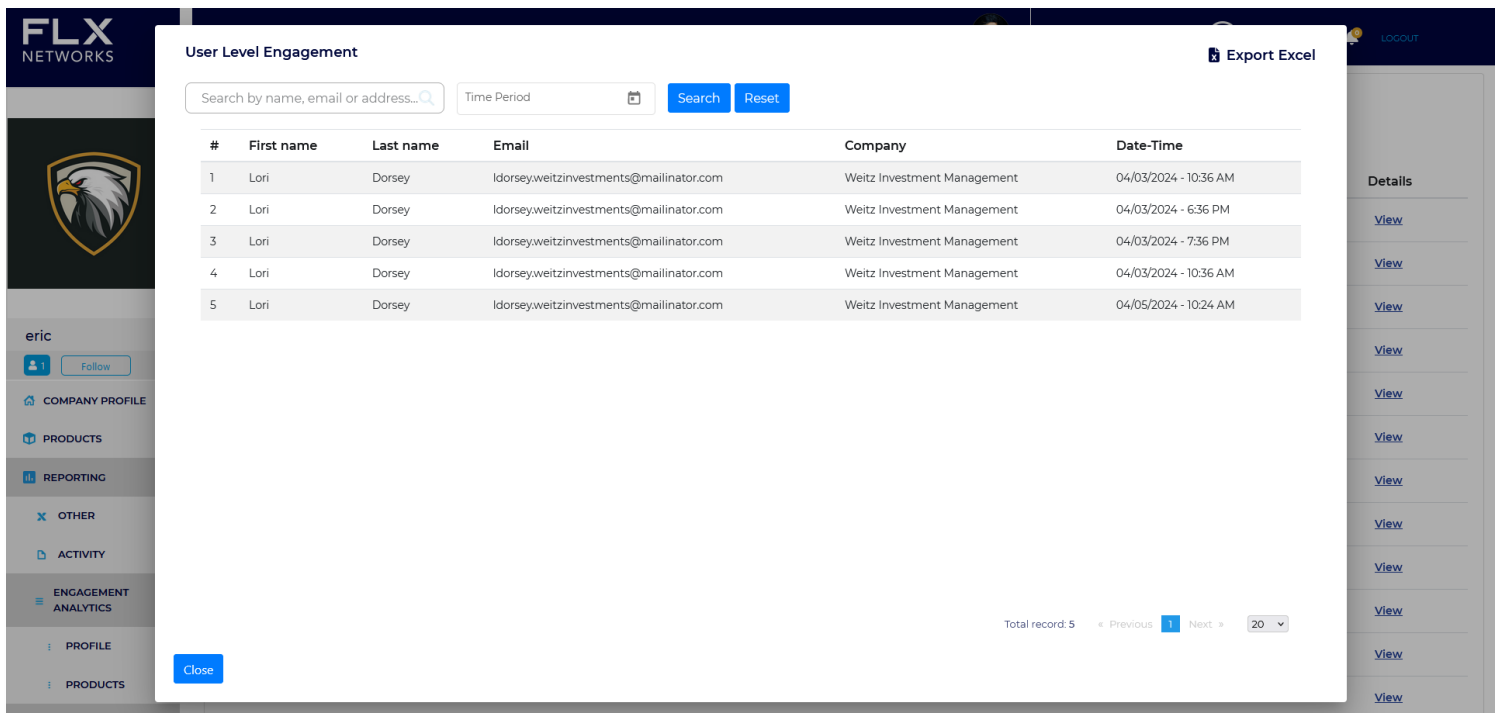
Search by Insights title...

Search

Reset

#	Title ^	Source	Posted Date ^	Featured	Counts ^	Details
1	<a href="#">U.S. Weekly FundFlow...</a>	Lipper Inc.	04/26/2024		13	<a href="#">View</a>
2	<a href="#">Global Market Intell...</a>	Broadridge Financial Solutions Inc	05/13/2024		12	<a href="#">View</a>
3	<a href="#">Why Astor Active Inc...</a>	Astor Investment Management LLC	04/04/2024	Yes	11	<a href="#">View</a>
4	<a href="#">Global Market Intell...</a>	Broadridge Financial Solutions Inc	04/11/2024		10	<a href="#">View</a>
5	<a href="#">Quarterly Markets Re...</a>	RiverNorth Capital Management LLC	04/30/2024	Yes	9	<a href="#">View</a>
6	<a href="#">The What, Why and H...</a>	TrueMark Investments LLC	05/14/2024	Yes	9	<a href="#">View</a>
7	<a href="#">Private credit loss...</a>	FS Investments	05/27/2024	Yes	8	<a href="#">View</a>
8	<a href="#">Credit Events Q1 202...</a>	Destra Capital Management LLC	04/03/2024		8	<a href="#">View</a>
9	<a href="#">Asset Managers Need...</a>	Boston Consulting Group	05/10/2024		8	<a href="#">View</a>
10	<a href="#">Is Boeing's Stock Ab...</a>	Argent Capital Management LLC	05/13/2024		7	<a href="#">View</a>
11	<a href="#">Private Fund Trends...</a>	Evestment Alliance LLC	04/25/2024		7	<a href="#">View</a>

# User Level Engagement Analytics



**User Level Engagement**

Search by name, email or address... Time Period Search Reset

#	First name	Last name	Email	Company	Date-Time
1	Lori	Dorsey	ldorsey.weitzinvestments@mailinator.com	Weitz Investment Management	04/03/2024 - 10:36 AM
2	Lori	Dorsey	ldorsey.weitzinvestments@mailinator.com	Weitz Investment Management	04/03/2024 - 6:36 PM
3	Lori	Dorsey	ldorsey.weitzinvestments@mailinator.com	Weitz Investment Management	04/03/2024 - 7:36 PM
4	Lori	Dorsey	ldorsey.weitzinvestments@mailinator.com	Weitz Investment Management	04/03/2024 - 10:36 AM
5	Lori	Dorsey	ldorsey.weitzinvestments@mailinator.com	Weitz Investment Management	04/05/2024 - 10:24 AM

Total record: 5 Previous 1 Next 20

Close

## OPEN ITEMS / UPCOMING:

The following enhancements are planned for upcoming releases:

- FLX Mobile App experience

## END OF DOCUMENT