



# Release Notes 23.06

## January 9<sup>th</sup>, 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
<b>UI / UX</b>	Renaming of Dashboard page	The Dashboard has been renamed to Launchpad for all users.
<b>UI / UX, Platform Navigation &amp; Content</b>	New Launchpad	The dashboard underwent a comprehensive redesign that includes content and navigation enrichment. Components include the following: <ul style="list-style-type: none"> <li>Featured Investment Insights</li> <li>FLX Community Insights offers Quick Links to FLX TV and FLX Casts content.</li> </ul>

		<ul style="list-style-type: none"> <li>Dedicated section for FLX solutions, providing swift access to focus solutions.</li> <li>Two new sections for the News Feed have been introduced, both tailored to display group-specific channels.</li> </ul>
<b>UI / UX, Platform Navigation &amp; Content</b>	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"> <li>A new Featured Insights section has also been introduced to align with FLX Intelligence Roundup.</li> </ul>
<b>UI / UX - FLX Media</b>	FLX TV & FLX Casts	Partnered with Spotlightr to optimize performance and to enhance how video content renders within the UI.
<b>UI - Member Profile</b>	Top Stories.	Section removed, as content has been migrated to new Launchpad
<b>WME - Audit Log</b>	All Logs.	The issue of null creation dates for certain older records has been addressed.
<b>Member Onboarding - DP</b>	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

All Insights

**A Picture Is Worth 1,000 Words – November 2023**

1 A PICTURE IS WORTH 1000 WORDS We have written a nu...  
 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

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**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

- 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

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: 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...

**SHARED CLIENT ENGAGEMENT >**  
Personnel, including wholesaling and national account distribution.

**PUBLIC RELATIONS >**  
Brand building and reputation enhancement through credibility and validation.

[View all FLX Solutions](#)

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

**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 Volatilities

**FEATURED**

**How 2023 Broke Investor Expectations**

Argent Capital  
Dec 28, 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...

**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 ...

**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...

**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...

**Let's Look at Labor, Emp Pavroll Trends**

**Monthly Commentary**

**Quarterly Commentary**

## Insights - Featured Carousel

The screenshot shows the FLX Networks Insights interface. At the top, there is a dark blue header with the FLX Networks logo on the left, a user profile for Brett Schechterman (FLX TEAM) in the center, and navigation icons (home, search, sign out, info, notifications) on the right. Below the header, there is a 'Type' dropdown menu. On the left side, a blue box titled 'FLX Featured Insights Carousel:' contains two bullet points: 'Provides ability for FLX to feature content from Community content contributors' and 'As of today, provide for 6 stories to align with FLX Intelligence Roundup'. Below this box is a list of categories with checkboxes and percentages: Inflation (27.1%), Central Banks (26.3%), Interest Rates (24.2%), and Recession (15.4%). The main content area features a 'FEATURED' section with the article 'Revisiting High Yield' by Northeast Investors Trust, dated Dec 15, 2023, 9:10:32 AM. The article text mentions Bill Hertz and portfolio managers Bruce Monrad and Chapin Mechem. A 'Read More' link is visible below the text. The carousel has navigation arrows on the left and right sides and a progress indicator at the bottom.

## 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