



# 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

The screenshot displays the FLX AI interface. At the top, there's a navigation bar with the FLX NETWORKS logo, a home icon, 'FLX AI', user information 'FLX TEAM Kunajit Nath KN', version '3.2024.515', search, and logout options. Below this is a breadcrumb trail: 'Asset Management Industry Pulse'. The main content area is split into two columns. The left column, titled 'Channels and Filters', has sections for 'Channels', 'Topic', and 'Source', each with a dropdown arrow, and a 'Clear Filters' button. The right column, titled 'News', shows three news items: 'Illinois Municipal Retirement Fund Approves \$282.5 Million in Commitments to Four Alternatives Managers', 'Morningstar names new global head of manager research', and 'Fund Files: Cap Group shakes up PMs on \$2.7bn fund'. Each item includes a 'Go to article' link, tags, and a timestamp. Below the news feed is a navigation bar for analytics: 'AI Summary', 'Analytics - Mentions', 'Analytics - Media Coverage', and 'Analytics - Word Cloud'. The 'AI Summary' section is active, showing 'Prompt Options' on the left and a 'Response' area on the right. The 'Prompt Options' list includes 'Popular prompts', 'One Sentence Summaries', 'Bullet Headlines', and 'Business Briefing'. At the bottom of this section are 'Number of articles used' (set to 10), a 'Use full articles' checkbox, and a 'Generate AI Response' button. The 'Response' area contains a large grey box with a curved arrow pointing left and the text: 'To get started, pick a prompt on the left and hit the "Generate AI Summary" button. You can also type your own prompt.'

This close-up screenshot focuses on the 'Prompt Options' menu. It shows a list of prompts with right-pointing arrows: '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', and 'Newsletter Preamble'. At the bottom, there's a 'Number of articles used' field with the value '10', a 'Use full articles' checkbox, and a 'Generate AI Response' button.

# AM Community Pages - Product Offerings

FLX NETWORKS

ASSET MANAGER  
eric

Version 3.2024.6.11 SEARCH LOGOUT

eric

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

### 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

### 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](#)

# Engagement Analytics

FLX NETWORKS

ASSET MANAGER  
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Version 3.2024.6.3 SEARCH LOGOUT

eric

COMPANY PROFILE

PRODUCTS

REPORTING

OTHER

ACTIVITY

ENGAGEMENT ANALYTICS

PROFILE

INSIGHTS

#	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** Export Excel

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