

# Freemium Portfolio - CREATION GUIDE

**July 2016**

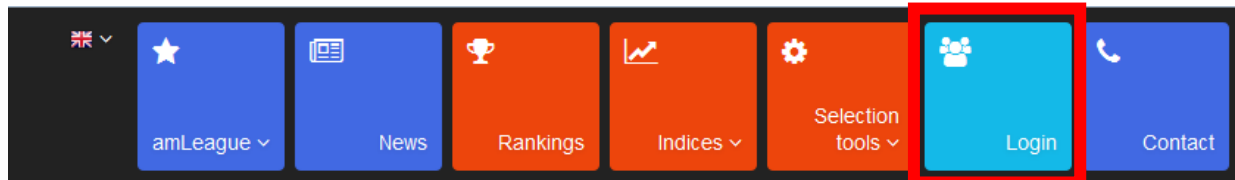
## Objective and table of contents

This document is intended to Asset Managers who wish to participate to 'Same Level Playing Field' performance tables in a Freemium mode.

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## 1. Create an account


- Go to amLeague https-certified website: <https://www.am-league.com>
- Click on 'Login' in the header menu and create an account




- A window opens: please fill in the form

**Become a member**

Subscription to amLeague website private area is free. To signup, please fill in the form below:

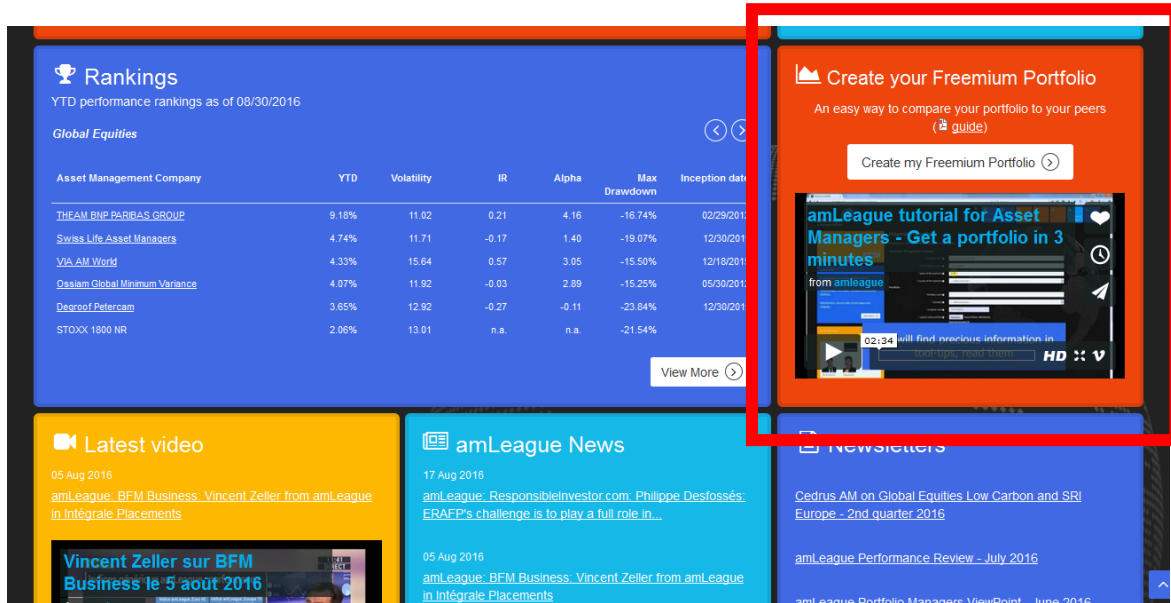
Email *	<input type="text"/>	Job title	<input type="text"/>
Password *	<input type="password"/>	Phone	<input type="text"/>
Confirm password *	<input type="password"/>	Address	<input type="text"/>
First name *	<input type="text"/>	Postal code	<input type="text"/>
Last name *	<input type="text"/>	City	<input type="text"/>
Company *	<input type="text"/>	Country	-- Select in the list --
Category *	-- Select in the list --		

Type the text  

Fields marked with an asterisk (\*) are required.

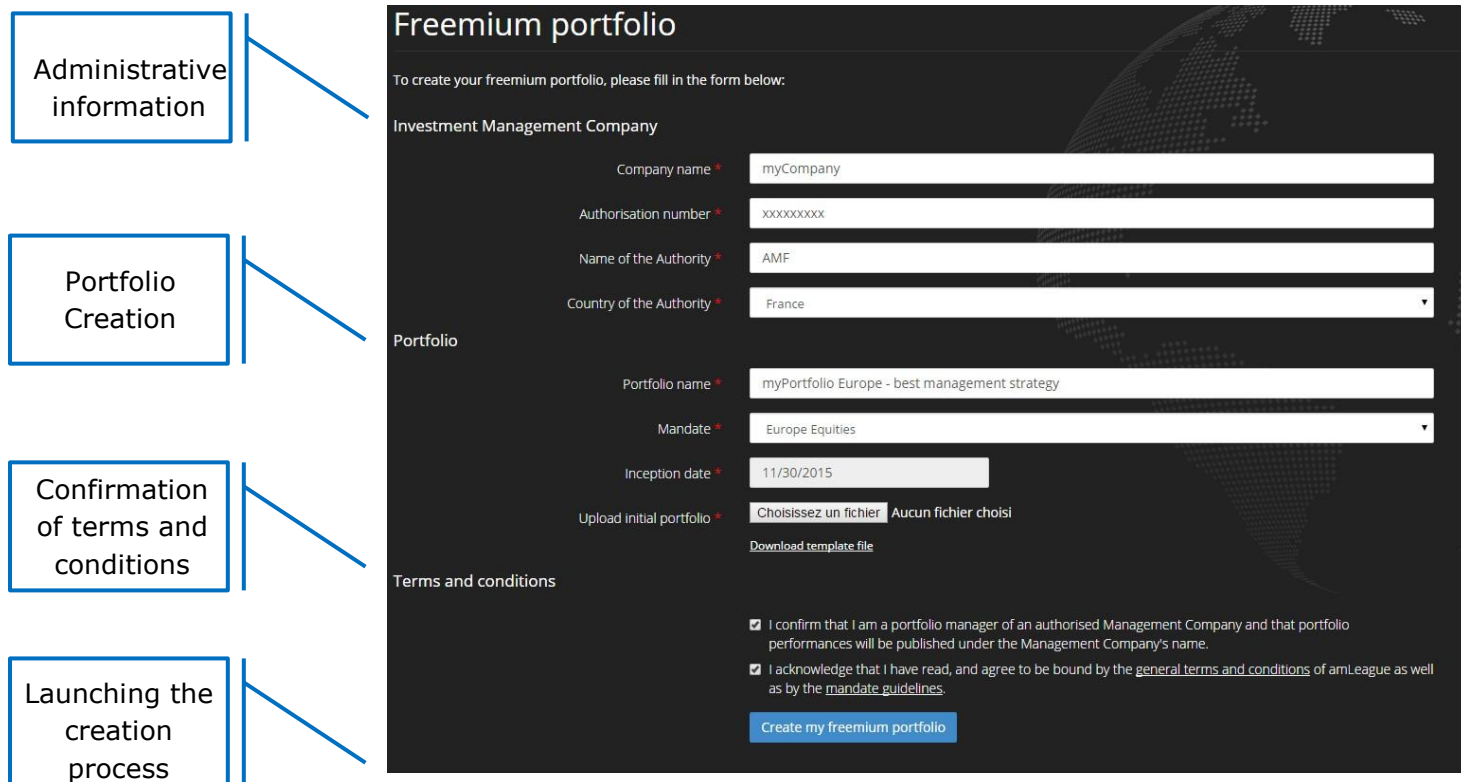
- Enter the Captcha code and save your form

Once your account is activated, click on the **'Create a Freemium Portfolio'** box in the home page of our website.



## 2. Create a freemium portfolio

The creation of a Freemium portfolio is a 4 steps process



**Freemium portfolio**

To create your freemium portfolio, please fill in the form below:

**Investment Management Company**

Company name \* myCompany

Authorisation number \* xxxxxxxx

Name of the Authority \* AMF

Country of the Authority \* France

**Portfolio**

Portfolio name \* myPortfolio Europe - best management strategy

Mandate \* Europe Equities

Inception date \* 11/30/2015

Upload initial portfolio \* Choisissez un fichier Aucun fichier choisi  
[Download template file](#)

**Terms and conditions**

I confirm that I am a portfolio manager of an authorised Management Company and that portfolio performances will be published under the Management Company's name.

I acknowledge that I have read, and agree to be bound by the [general terms and conditions](#) of amLeague as well as by the [mandate guidelines](#).

[Create my freemium portfolio](#)

**Administrative information**

**Portfolio Creation**

**Confirmation of terms and conditions**

**Launching the creation process**

### 2.1. Administrative information

Only authorized management companies are allowed to create portfolios on amLeague trading platform. Therefore, you are asked to enter

- The name of your company
- Its authorization code: the code delivered by its Regulator authorizing the company to manage financial portfolios
- Name of the Authority or Regulator (eg. SEC for USA, AMF for France, ...)
- The country of the Regulator

**Please note:**

amLeague will check that your company is registered with an Authority regulating the asset management activity before publishing the performance of your portfolio on its website.

## 2.2. Initial portfolio

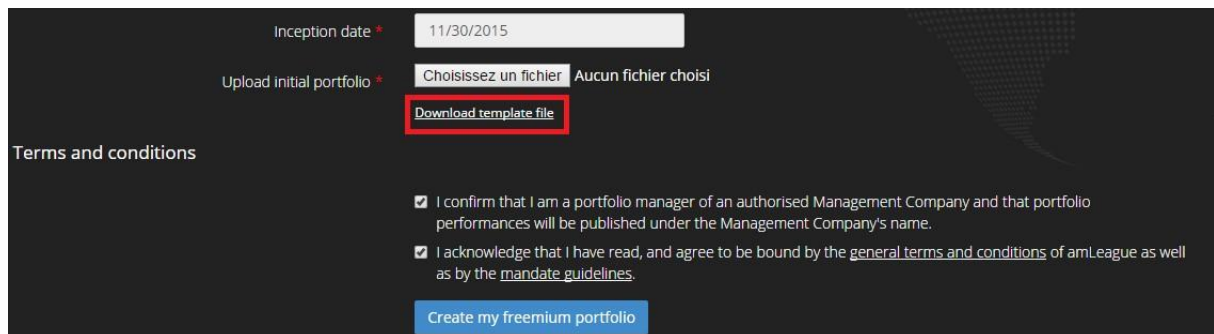
Give a name to your portfolio: this is the name that will appear in the Rankings section on [www.am-league.com](http://www.am-league.com). It can be your company name or a more detailed name.

Choose the universe in which you want to manage your portfolio:

- Euro Equities
- Europe Equities
- Europe SRI Equities
- Global Equities
- Global Low Carbon
- Multi Asset Class

Fix the inception date of your portfolio, ie. the day your portfolio will be valorized for the first time with close price. You can select any date but for comparison purposes, amLeague usually suggests to set the inception date as the last open day of a month. You can upload a portfolio today and ask for a first valuation on a future date.

Finally, download the Excel template file to create your initial portfolio.



The screenshot shows a dark-themed web form for creating a portfolio. It includes the following elements:

- Inception date \***: A text input field containing "11/30/2015".
- Upload initial portfolio \***: A file selection area with a button labeled "Choisissez un fichier" and the text "Aucun fichier choisi". Below it, a red-bordered button labeled "Download template file" is highlighted.
- Terms and conditions**: A section with two checked checkboxes:
  - I confirm that I am a portfolio manager of an authorised Management Company and that portfolio performances will be published under the Management Company's name.
  - I acknowledge that I have read, and agree to be bound by the [general terms and conditions](#) of amLeague as well as by the [mandate guidelines](#).
- Create my freemium portfolio**: A blue button at the bottom of the form.

Register the Excel file on your computer and start to fill your initial portfolio:

- select or copy/paste an ISIN in the B column and all information will be automatically completed.
- Set the weight on the security in the F column. The total weight must fit with the mandate guidelines (for instance 98% to 100% for Euro or Global equities mandates, 0% to 100% for Multi Asset Class mandate).

Buy or Sell	Isin	Instrument	Stock Exchange	Currency	Weight (%)
BUY	IT0003153415	SNAM RETE GAS	Mercado Continuo Italiano	EUR	33.00%
BUY	AT0000A18XM4	AMS AG	SIX Swiss Exchang	CHF	33.00%
BUY	BE0003764785	KERMANS & VAN HAAREN	NYSE EuroNext Brussels	EUR	33.00%
BUY	BE0003565737				
BUY	BE0003593044				
BUY	BE0003739530				
BUY	BE0003928125				
BUY	BE0003793107				
BUY	BE0003797140				
BUY	BE0003810273				
BUY	BE0003826436				
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Once ready, register this file on your computer and upload it via the interface.

**Please note:**

This portfolio will be valorized for the first time at the inception date you selected and will be published on [www.am-league.com](http://www.am-league.com) as soon as the verification process of you company is satisfactory.

### 2.3. Terms and conditions

Check the boxes after having read carefully the general terms and conditions as well as the guidelines of the mandate to which your portfolio pertains.

Note that the guidelines are also published on amLeague website and on amLeague Trading Platform.

Inception date \* 11/30/2015

Upload initial portfolio \* Choisissez un fichier aucun fichier choisi  
[Download template file](#)

Terms and conditions

I confirm that I am a portfolio manager of an authorised Management Company and that portfolio performances will be published under the Management Company's name.

I acknowledge that I have read, and agree to be bound by the [general terms and conditions](#) of amLeague as well as by the [mandate guidelines](#).

[Create my freemium portfolio](#)

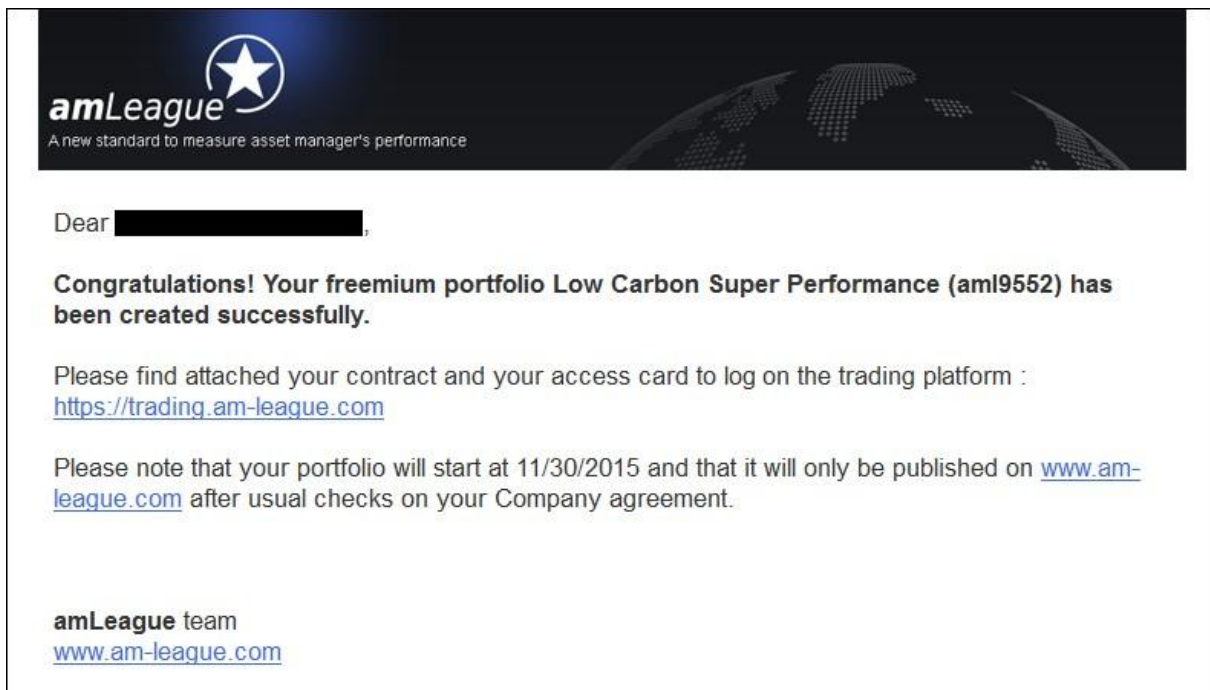
**Please note:**

Your portfolio's performances along with other performance indicators will be published under your Company's name or the name you gave to the portfolio with your name beside. **Once created, any administrative change should be addressed in writing to support@am-league.com.**

## 2.4. Launching the Freemium portfolio creation process

By clicking on '**Create my freemium portfolio**', all the information will be sent to our platform. You will immediately receive an e-mail confirming your registration with 2 documents attached:

- your **contract**
- your **access card** to log on amLeague Trading Platform

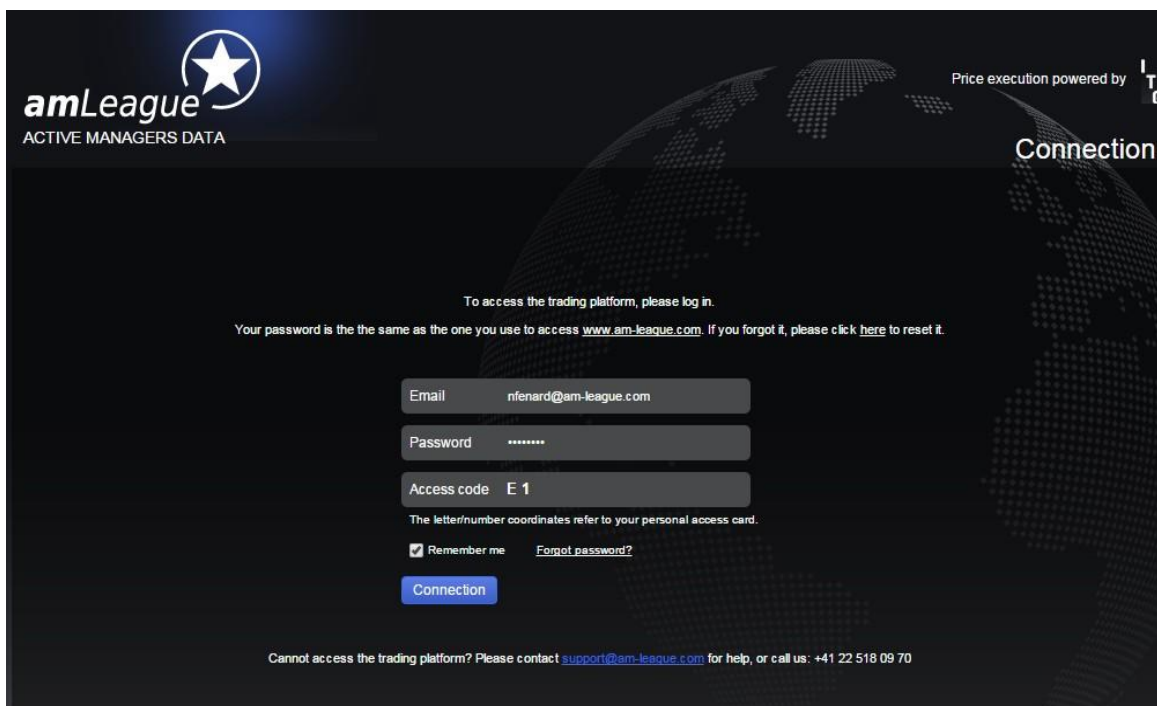


**From Inception date +1, you can start managing your portfolio through amLeague Trading platform**

### 3. Managing your freemium portfolio

The access card sent in the email is used to secure the access to your portfolio on amLeague Trading Platform.

- Go to amLeague https-certified website: [trading.am-league.com](https://trading.am-league.com)



- Enter your credentials and access the platform:
 

<ul style="list-style-type: none"> <li>✓ <b>User ID</b></li> <li>✓ <b>Passcode</b></li> <li>✓ <b>Access</b></li> </ul>	<ul style="list-style-type: none"> <li>Insert your amLeague account login email</li> <li>Insert your amLeague account password</li> <li>Insert access code</li> </ul>
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The **Trading Platform Userguide** (available on the website) details the different steps to manage your portfolio(s).

If you encounter problems with the website or the trading platform, please contact amLeague hotline:

- E-mail: [support@am-league.com](mailto:support@am-league.com), copy [nfenard@am-league.com](mailto:nfenard@am-league.com)
- Phone: +41 (0)22 518 09 70 (from 9:00 (CET) to 18:00 (CET))