

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: <u>https://www.am-league.com</u>
- Click on 'Login' in the header menu and create an account

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	amLeague ∽	News	Rankings	Indices ~	Selection tools ∽	Login	Contact

• A window opens: please fill in the form

Become a m	ember					
Subscription to amLeague wel	bsite private area is free. To signup, plea	ise fill in the form below:				
Email®			Job title		The same results	4498
Password *			Phone		2144422 5944422	ANNAL CONTRACTOR
Confirm password			Address			11111
First name *		P	ostal code			
Last name			City			
Company *			Country	Select in the list		•
Category*	Select in the list			SW 14	47 ST	
				Type the text Privacy \$	CAPTCH	A
				Fields marked with an as	terisk (*) are required.	
				Save		

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.

C Rankings				୕ୖଡ଼ଡ଼	Create your Freemium Portfolio An easy way to compare your portfolio to your peers (a guide)				
sset Management Company		Volatility		Alpha	Max Drawdown	Inception date	Create my Freemium Portfolio 🕥		
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IA. AM World						12/18/201	minutes 🕚		
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Latest video			amLeag	gue Ne	ews	L			
05 Aug 2016 amLeague. BFM Business: Vincent Zeller from amLeague In Intégrale Placements Vincent Zeller sur BFM			17 Aug 2018 amLeague: ResponsibleInvestor.com: Philippe Desfossés; ERAFP's challenge is to play a fuil role in				Cedrus AM on Global Equities Low Carbon and SRI Europe - 2nd quarter 2016		
			ague: Respon						



Freemium Portfolio - CREATION GUIDE.



2. Create a freemium portfolio

	k	Freemium portfolio	
Administrative		To create your freemium portfolio, please fill in the for	n below:
information		Investment Management Company	
		Company name*	myCompany
		Authorisation number*	200000000X
Portfolio		Name of the Authority*	AMF
Creation		Country of the Authority*	France
Creation		Portfolio	
		Portfolio name *	myPortfolio Europe - best management strategy
		Mandate *	Europe Equities
Confirmation		Inception date *	11/30/2015
of terms and		Upload initial portfolio *	Choisissez un fichier Aucun fichier choisi
conditions		Terms and conditions	Download template file
			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.
Launching the	K		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.
creation			Create my freemium portfolio

The creation of a Freemium portfolio is a 4 steps 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.

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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. 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.

	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 a performances will be published under the	an authorised Management Company and that portfolio Management Company's name.
		I acknowledge that I have read, and agree as by the <u>mandate guidelines</u> .	to be bound by the <u>general terms and conditions</u> of amLeague as well
		Create my freemium portfolio	

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).



	B9		BE0003764785			
	А	В	С	D	E	F
1 2 3 4 5	amLeague					
6	Buy or Sell	Isin	Instrument	Stock Exchange	Currency	Weight (%)
7	BUY	IT0003153415	SNAM RETE GAS	Mercado Continuo Italiano	EUR	33.00%
8	BUY	AT0000A18XM4	AMS AG	SIX Swiss Exchang	CHF	33.00%
9	BUY	BE0003764785	KERMANS & VAN HAAREN	NYSE EuroNext Brussels	EUR	33.00%
10	BUY	BE0003565737 BE0003593044				
11	BUY	BE0003593044 BE0003739530				
12	BUY	BE0003764785 BE0003793107				
13	BUY	BE0003797140				
14	BUY	BE0003810273 BE0003826436				
15	BUY	DE0003826436				
16	BUY					
17	BUY					
18	BUY					
19	BUY					
20	BUY					
21	BUY					
22	BUY					
23	BUY					

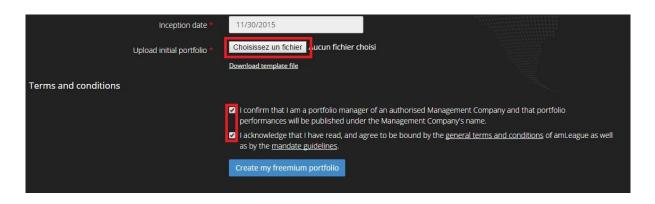
Once ready, register this file on your computer and upload it via the interface.

Please note: This portfolio will be valorized for the first time at the inception date you selected and will be published on <u>www.am-league.com</u> 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.





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

amLeague	re asset manager's performance	ß		
Dear	,			
Congratulation been created s	s! Your freemium porti uccessfully.	folio Low Carbon S	uper Performa	nce (aml9552) has
Please find attac https://trading.ar	ched your contract and y m-league.com	your access card to I	og on the tradin	g platform :
	your portfolio will start a r usual checks on your (ublished on <u>www.am-</u>
amLeague team				

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: <u>trading.am-league.com</u>

amLeague ACTIVE MANAGERS DATA	P	rice execution powered by T G Connection
	To access the trading platform, please log in.	
Your password is the the sa	me as the one you use to access <u>www.am-leaque.com</u> . If you forgot it, please click <u>here</u> to reset it.	
	Email nfenard@am-league.com	
	Password	
	Access code E1	
	The letter/number coordinates refer to your personal access card.	
	Remember me Forgot password?	
	Connection	
Cannot access the tra	ading platform? Please contact <u>support@am-league.com</u> for help, or call us: +41 22 518 09 70	

- Enter your credentials and access the platform:
 - User ID Passcode
 - ✓ Access

Insert your amLeague account login email Insert your amLeague account password Insert access code

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: <u>support@am-league.com</u>, copy <u>nfenard@am-league.com</u>
- Phone: +41 (0)22 518 09 70 (from 9:00 (CET) to 18:00 (CET))