

# MUTUAL FUND PROFILE SECURITY

For our anniversary, we embark on a visual journey of our progression since inception in 1998. Here are our milestone moments throughout Profile's history to date



Profile Security Issue Database enhanced service to systematically source data from prospectuses and other documents filed within the SEC's EDGAR database.



1998

2012

2014

Profile Security Issue Database was enhanced with a modernized, cognitive sourcing engine and new user interface, utilizing AI and machine learning for data sourcing.



2017

2019

Profile Security Issue Database enhanced the specification report process allowing Intermediaries to create customized reporting templates based on their business needs.



2022

Profile Security Issue and Distribution Database was introduced to provide an essential repository of prospectus, operational processing rules, and distribution data for mutual fund securities.



Profile Security Issue Database introduced a comparison tool and scorecard identifying variances between existing information in Profile Security vs. a prospectus and other source documents filed in the SEC's EDGAR database, requiring review from the Funds to ensure data accuracy.



Profile Security Issue Database introduced systematic generation of specification reports leveraging data populated within Profile Security, eliminating manual data entry, and reducing reporting errors.

