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13 November 2020

AMF policy documents: user guide

Do you want to consult a recommendation, a position or an instruction on a specific topic? Are you searching for the latest published policy documents or a previous version? Do you want to find out more about how policies are viewed and how you can access them? Follow our user guide.

You wish to consult...

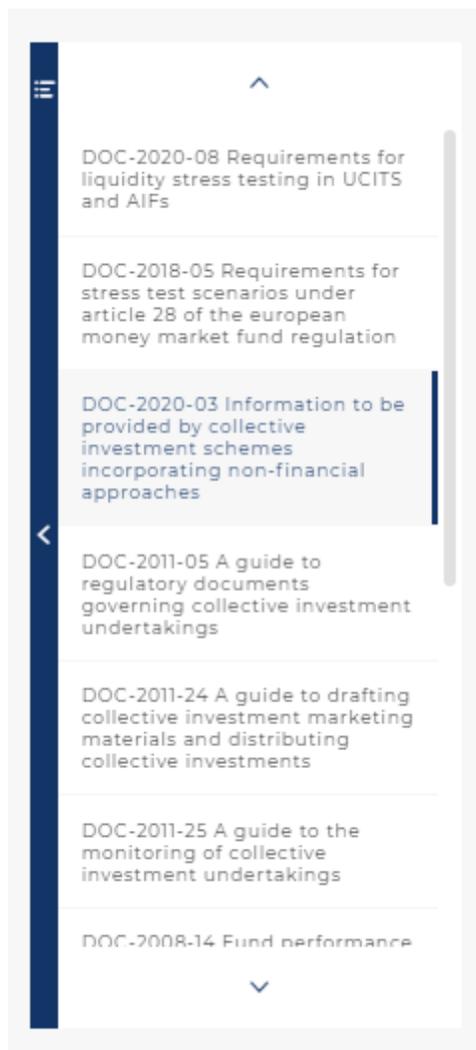
A policy document on a specific topic

Go to the "Applicable Policy" section and click on the theme and sub-themes of interest until you reach the document that you wish to consult.

Here are the six main themes/headings:

- 1 • Issuers and financial disclosure
- 2 • Investment products
- 3 • Providers
- 4 • Marketing - Customer relationship
- 5 • Market infrastructure and other market participants
- 6 • Market abuse

When you find the document you are looking for, you can go back to the previous step by clicking on the blue vertical bar in the left menu or on the red button to return to the "Policy" area.



Most recent published policy documents

Click on the "Most recent published policies" section. You will find the list of the latest published documents. You can also search for documents by date, policy type or by key word.

The list of instructions classified by General Regulation book

Go to the "AMF Instructions for each Book" section and choose the book of the General Regulation in which you are interested. Each book of the General Regulation has its own section with the list of related instructions.

A policy document that has become obsolete

Find the policy documents that have become obsolete in the dedicated section "Obsolete Policies". You will find the list of documents that have recently become obsolete and you can also search for documents by date, policy type or by key word.

Focus on the display and features available for each document

For each policy reference, you will find a wide range of information that can be viewed on a single page. Here is what you can find, from top to bottom:

- Place of classification in the theme-based plan
- Main subject (in the example: "obligation of information")
- Date of entry into force
- Type of policy and its reference
- Title of the document
- "Download the policy" button that allows you to download a policy document and its appendices with a single click
- List of reference documents
- Links (appendices) if any
- Archives, i.e. the other versions of the document consulted (obsolete versions or awaiting application versions, if there are any)
- Keywords are the topics mentioned in the document that are complementary to the main topic displayed at the top of the page

II - Investment products

II.1 - Collective investment schemes (CISs)

II.1.1. Common provisions applicable to UCITS and CISs

The screenshot displays a webpage for a policy document. At the top, there are tabs for 'POLICY' and 'UCIT'. To the right, there are social media icons for email, Twitter, LinkedIn, and Facebook. Below these, a green box indicates 'Applicable from 27 July 2020'. The document title is 'Information to be provided by collective investment schemes incorporating non-financial approaches'. A 'Document' section features a 'Download policy' button. Under 'Reference texts', there are two links: 'Articles L. 533-12, L. 533-22-1 and L. 533-22-2-1 of the Monetary and Financial Code (in french only)' and 'Articles 411-126 and 421-25 of the General Regulation'. An 'Archives' section shows a dropdown for 'From 11 March 2020 to 26 July 2020' and a link to the document. At the bottom, a 'Keywords' section includes a tag for 'DISCLOSURE OBLIGATIONS'.

Easier access and searches

The AMF's website offers an optimised view of the policy, regardless of the device that you are using (computer, mobile phone or tablet).

Policy documents have also been enhanced with properties (topics and players concerned) to enable better search results.

[Access the advanced search of the policy](https://www.amf-france.org/en/recherche). URL = [https://www.amf-france.org/en/recherche]

Keywords

REGULATORY DEVELOPMENTS

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