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Reference (eg. DOC-2020-02), keywords...



II - Investment products

II. 1 - Collective investment schemes (CISs)

II. 1.1. Common provisions applicable to UCITS and CISs

Applicable from 16 February 2023

Position - Recommendation DOC-2011-24

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Archives

- ✓ From 02 February 2022 to 15 February 2023 | Position - Recommendation DOC-2011-24

Guide to drafting marketing communications and distributing collective investments and SOFICA fund

This guide outlines the behaviours to be adopted and the bad practice which is prohibited when drafting CIS marketing materials and when

distributing CIS (general principles, communication on financial indexes and strategy, etc.). These provisions cover structured funds, index funds, funds using Constant Proportion Portfolio Insurance (CPPI) strategies, SOFICAs, real-estate funds and authorised venture capital funds.

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Reference texts

↳ Article L. 533-12 of the Monetary and Financial Code (in french only) [↗](#)

Article L. 533-22-2-1 of the Monetary and Financial Code (in french)

↳ only) [↗](#)

Article L. 541-8-1 of the Monetary and Financial Code (in french)

↳ only) [↗](#)

↳ Article 325-12 of the General Regulation

↳ Article 411-126 of the General Regulation

↳ Article 421-25 of the General Regulation

Article 4 of Regulation (EU) 2019/1156 of the European Parliament and

↳ of the Council of 20 June 2019 [↗](#)

From 16 March 2021 to 01 February 2022 | Position - Recommendation DOC-2011-24

A guide to drafting collective investment marketing materials and distributing collective investments

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- Article L. 541-8-1 of the Monetary and Financial Code (in french only) [↗](#)
- Article 411-126 of the General Regulation [↗](#)
- Article 421-25 of the General Regulation [↗](#)

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- ✓ From 17 July 2020 to 15 March 2021 | Position - Recommendation DOC-2011-24

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 - Article L.533-22-2-1 of the Monetary and Financial Code (in French only) [↗](#)
 - Article L.541-8-1 of the Monetary and Financial Code (in French only) [↗](#)
- From 22 January 2018 to 02 January 2019 | Position - Recommendation DOC-2011-24

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- Article L.533-12 of the Monetary and Financial Code (in French only) [↗](#)

↳ Articles 314-10 to 314-17 and 319-5 of the AMF General Regulation [↗](#)

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- ▽ From 26 May 2016 to 11 January 2017 | Position - Recommendation DOC-2011-24

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Keywords

COLLECTIVE INVESTMENTS

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