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

IV - Marketing - Customer relationship

IV. 2 - Specific provisions applicable to certain products

Applicable from 2 August 2021

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Position - Recommendation DOC-2014-04

Guide to UCITS, AIF and other investment fund marketing regimes in France

Document

Summary

Position DOC-2014-04 provides explanations on the definition of marketing in France of units or shares of UCITS and AIFs, and describes the various regimes applicable to marketing of such entities in France.

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Reference texts

Guide to UCITS, AIF and other investment fund marketing regimes in France | AMF

- ☑ Article L. 211-41 of the Monetary and Financial Code
- ☑ Articles L. 214-2-2 of the Monetary and Financial Code C
- ☑ Article L.214-24-0 of the Monetary and Financial Code C²
- Article L. 214-24-1 of the Monetary and Financial Code C

Links

AMF Instruction DOC-2011-19: Procedures,
preparation of a KIID and a prospectus and periodic
reporting for French and foreign UCITS marketed in
France

Catalogue of French statutory and regulatory measures applicable to the marketing of shares or

🔰 units in foreign UCITS in France 🗋

Archives

From 26 June 2018 to 01 August 2021 | Position DOC-2014-04

Guide to UCITS, AIF and other investment fund marketing regimes in France

Position DOC-2014-04 provides explanations on the definition of marketing in France of units or shares of UCITS and AIFs, and describes the various regimes applicable to marketing of such entities in France.

From 15 March 2017 to 25 June 2018 | Position DOC-2014-04

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Reference texts

Article L. 214-2-2 of the Monetary and Financial Code (in French → only) C

Article L. 214-24-1 of the Monetary and Financial Code (in French → only) C

Links

Authorisation procedures, preparation of a KIID and a prospectus and periodic reporting for French and foreign UCITS marketed in France

Catalogue of French statutory and regulatory measures applicable to the marketing of shares or units in foreign UCITS in France

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Reference texts

Article L. 214-2-2 of the Monetary and Financial Code (in French → only) C

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Catalogue of French statutory and regulatory measures applicable to the marketing of shares or units in foreign UCITS in France

 From 26 June 2015 to 03 July 2016 | Position DOC-2014-04

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Article L. 214-2-2 of the Monetary and Financial Code (in French → only) C

Article L. 214-24-1 of the Monetary and Financial Code (in French → only) C

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> periodic reporting for French and foreign UCITS marketed in France

Catalogue of French statutory and regulatory measures applicable to the marketing of shares or units in foreign UCITS in France

From 30 June 2014 to 25 June 2015 | Position DOC-2014-04

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Reference texts

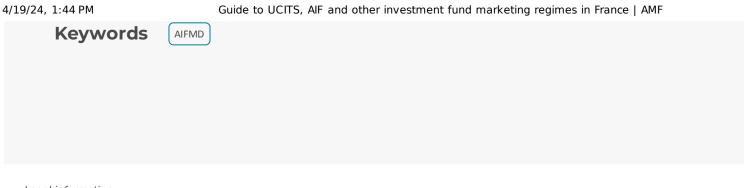
Article L. 214-2-2 of the Monetary and Financial Code (in french → only) C

Article L. 214-24-1 of the Monetary and Financial Code (in french → only) C

Links

Authorisation procedures, preparation of a KIID and a prospectus and periodic reporting for French and foreign UCITS marketed in France

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