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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 "Policy" button located in the left menu (red highlighted button) to return to the "Policy" area.



## Most recent published policy documents

Click on the "[Most recent published policies](https://www.amf-france.org/en/reglementation/doctrine/doctrine-en-vigueur) URL = [https://www.amf-france.org/en/reglementation/doctrine/doctrine-en-vigueur]" 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 all documents within the applicable Policy

Go to the "[AMF Policy by book](https://www.amf-france.org/en/regulation/policy/amf-policy-book) URL = [https://www.amf-france.org/en/regulation/policy/amf-policy-book]". In the same page, you will access to the applicable Policy classification plan and all the documents from the applicable Policy.

## 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](https://www.amf-france.org/en/regulation/policy/obsolete-policy) URL = [https://www.amf-france.org/en/regulation/policy/obsolete-policy]". 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

POLICY

UCIT

Applicable from 27 July 2020

Position - Recommendation DOC-2020-03

[Print](#)
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### Information to be provided by collective investment schemes incorporating non-financial approaches

Document

Download policy

Reference texts

- Articles L. 533-12, L. 533-22-1 and L. 533-22-2-1 of the Monetary and Financial Code (in french only) [↗](#)
- Articles 411-126 and 421-25 of the General Regulation [↗](#)

#### Archives

▼

From 11 March 2020 to 26 July 2020 | Position - Recommendation DOC-2020-03

Information to be provided by collective investment schemes incorporating non-financial approaches

Keywords

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 to the AMF Policy](https://www.amf-france.org/en/regulation/policy/amf-policy-book)
 URL = [https://www.amf-france.org/en/regulation/policy/amf-policy-book]

### Keywords

[REGULATORY DEVELOPMENTS](#)
[AMF WEBSITE](#)

## ON THE SAME TOPIC

NEWS

ASSET MANAGEMENT

25 September 2020

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NEWS

SUSTAINABLE FINANCE

28 July 2020

Sustainable finance and collective investment management: the AMF publishes an update of its investor information policy

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#### Legal information:

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