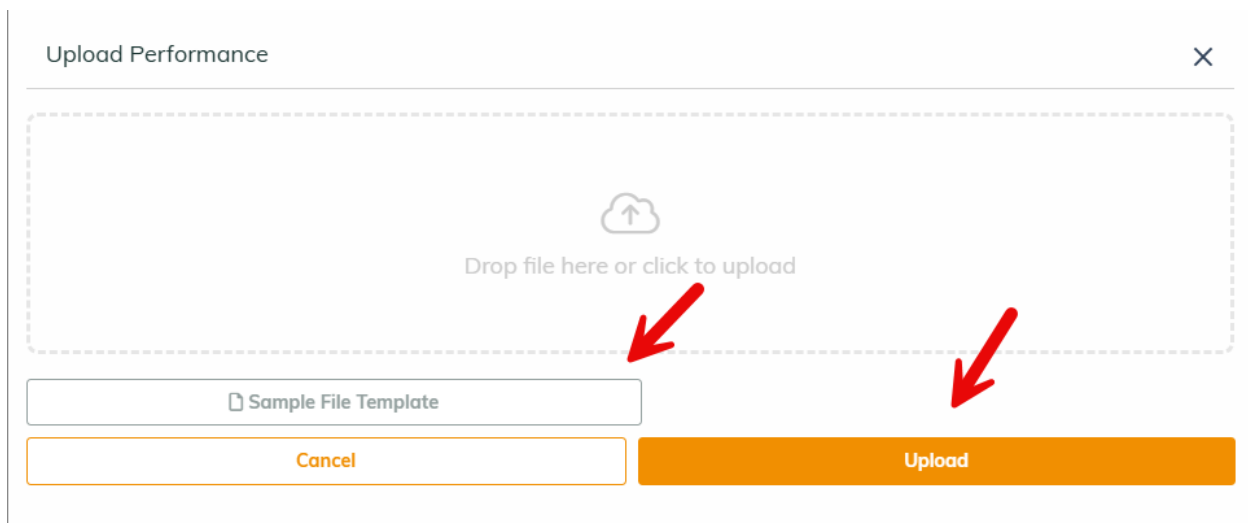
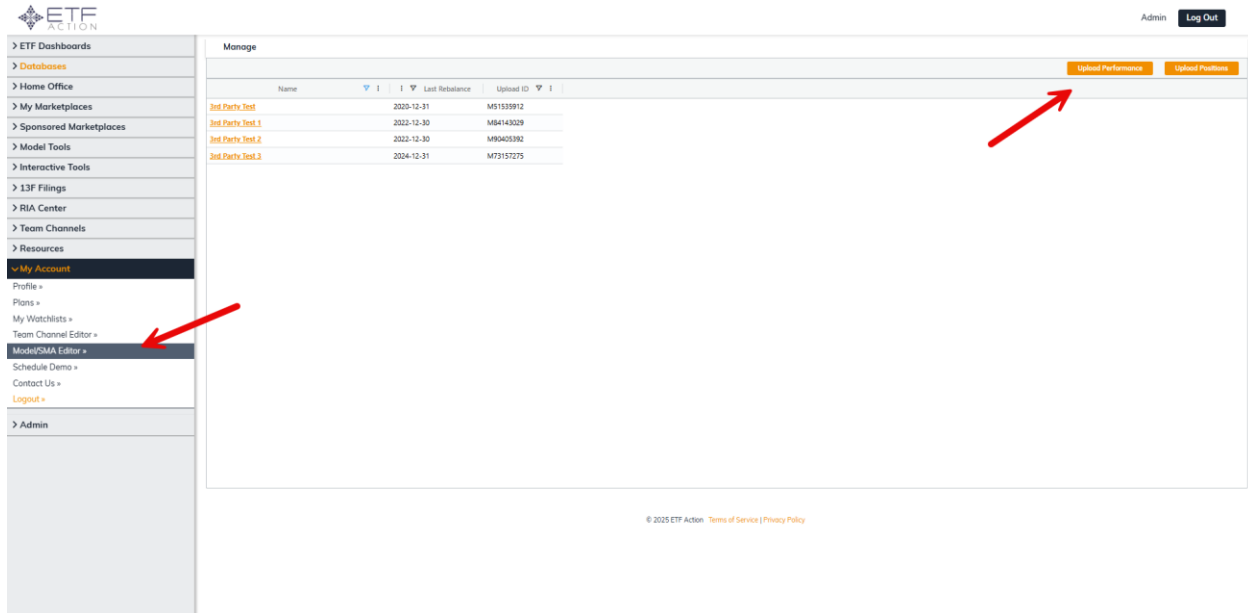


How To Upload Performance for the Models/ SMAs Database

- 1) Head to the Model/SMA Editor tool under the My Account dropdown
- 2) Click on the orange Upload Performance button at the top right of the screen
- 3) Drag and drop your performance CSV file and press upload



Required Format for Performance CSV File

We have created a Sample Performance Upload File Template that can be accessed via the Upload Performance button. The required format is a CSV file with a model_id column, an as_date column, a net_return column, and a gross return column. Please see below for description of each column

- 1) model_id will be the Model ID of each model you wish to upload performance for. The Model ID can be found from the Model/ SMA Editor tool under the My Account dropdown

- 2) as_date will be the month end date of the monthly performance you wish to include for each model in the file
- 3) net_return will be the performance net of fees for each model and date you wish to upload. Please note that this will be standard number format but will be uploaded as a percentage (ie .05 will be 5% and -0.0006% will be -0.06%). You can include as many decimal places as you see fit
- 4) gross_return will be performance gross of fees for each model and date you wish to upload. Please note that this will be standard number format but will be uploaded as a percentage (ie .05 will be 5% and -0.0006% will be -0.06%). You can include as many decimal places as you see fit

Please note that you can include performance data for multiple models and multiple dates on each file. Additionally, you can overwrite existing performance via the Upload Performance button by including the same Model ID and date you would like to replace.

Sample File Format:

	A	B	C	D	E
1	model_id	as_date	net_return	gross_return	
2	M84143029	6/30/2025	0.056	0.061	
3	M84143029	5/31/2025	0.084	0.087	
4	M73157275	6/30/2025	0.123	0.126	
5	M73157275	5/31/2025	0.025	0.028	
6					
7					
8					
9					
10					
11					