# Pulsar Connect Instructions Manual

**I) LISTING A NEW FUND ON THE PLATFORM**

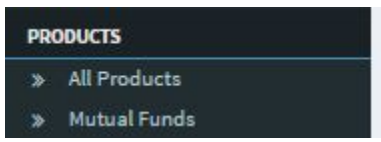
**II) LISTING DUE DILIGENCE DOCUMENTS IN A PRODUCT DATAROOM**

**III) LISTING RESEARCH DOCUMENTS IN THE RESEARCH CENTER**

On the Pulsar Connect platform, fund managers manage their own funds, products, research documents and dataroom (of the company and of each fund/product). Rest assured that each manager can only access its own funds and products, and the access to funds and products is only open to institutional investors and other (non managers) third parties.

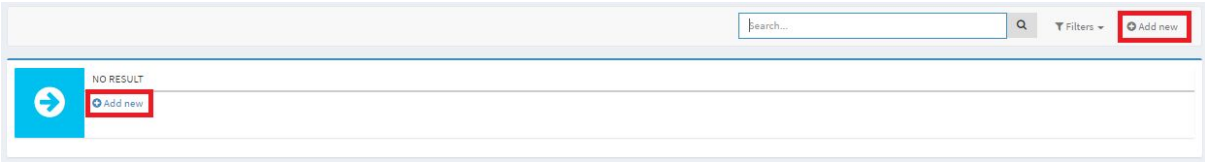
## I) LISTING A NEW FUND ON THE PLATFORM

You access to the list of your funds in this menu :

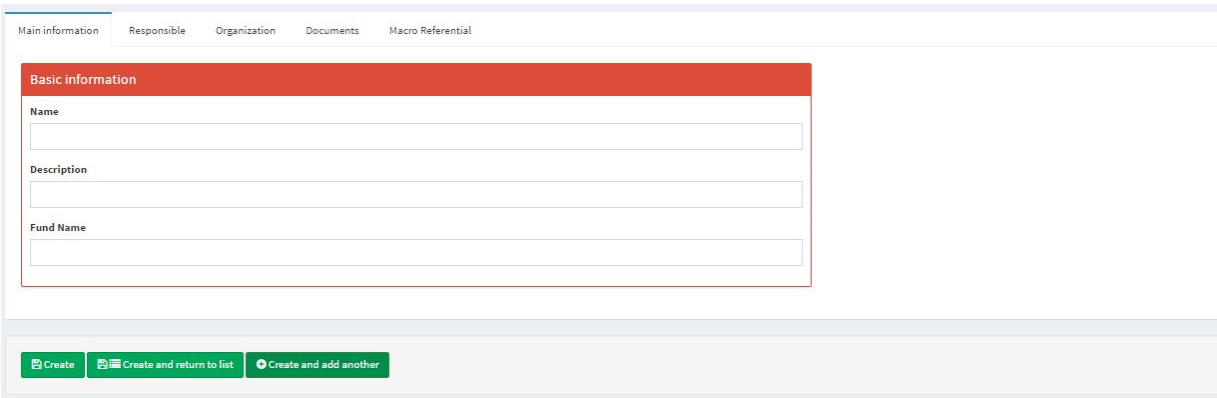



You can add new funds to the platform, edit and list them from there.

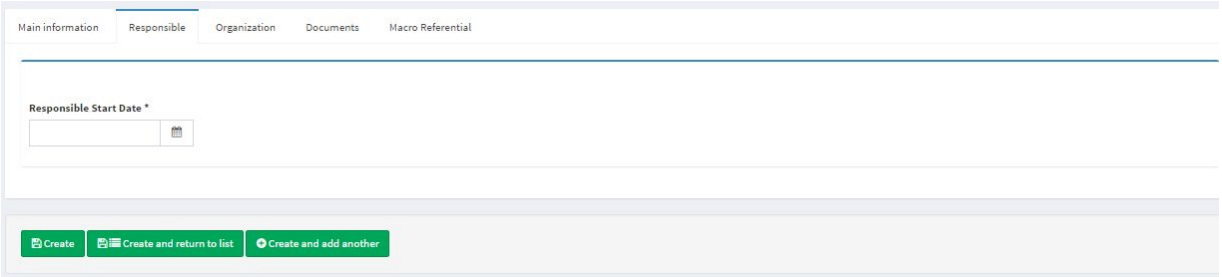
To create a fund on the platform, please use the "Add new" function :



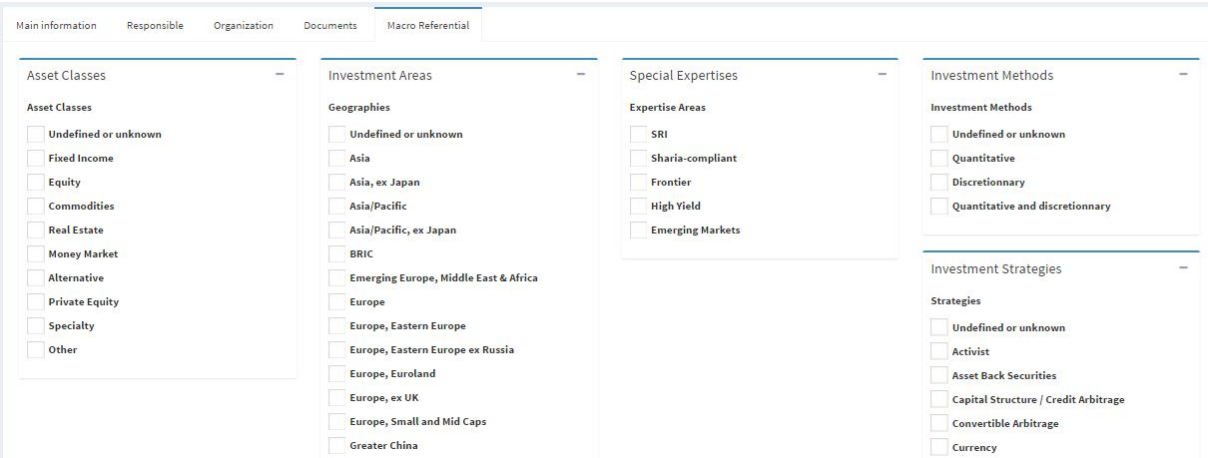

Then, please specify its main information :



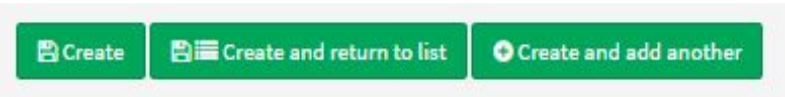

Please specify the date when the current fund manager started operating the fund




And finally, please check the boxes based on the basic characteristics of the fund :




Once you have completed the previous steps, you can click on “Create” or “Create and add another fund”:




Please be aware that only when you click on “Create” that you will be able to add additional information (ISIN, Ticker, Fees structure, Strategy description, … ,Marketable countries).

In case you click on “Create and return to list” or “Create and add another”, you will still have the possibility to add that information later (by using “Edit” button).

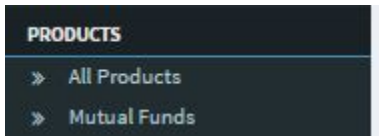
Once this is done, **congratulations!** Your first fund has just been added to Pulsar Connect fund database and our community of Investors can now access it. Now that your fund is listed on the platform, you can now create a Due Diligence Dataroom specially dedicated to this product.

Please note that you can have one dataroom for each product, and separately a general dataroom for your company’s documents.

## II) LISTING DUE DILIGENCE DOCUMENTS IN A PRODUCT DATAROOM

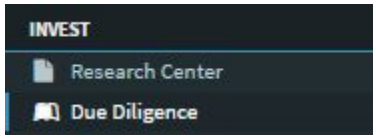
Here are the necessary steps to create a Due Diligence Dataroom for a Product

First of all, please check whether or not the product already exists in the fund database.

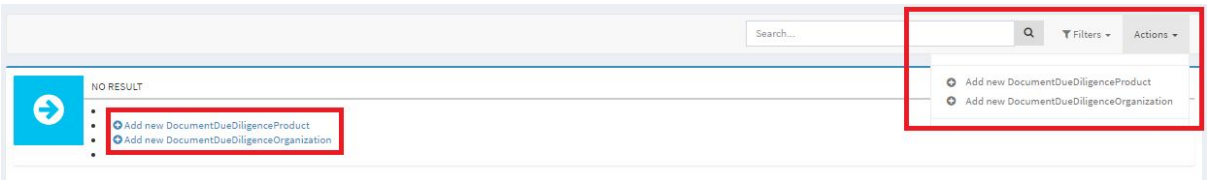



If it does not already exist, you can create it following the steps shown above in the document.

If it does exist, please access to the Due Diligence administration module in this menu :




You can start by selecting “Add new DocumentDueDiligenceProduct” as follows:

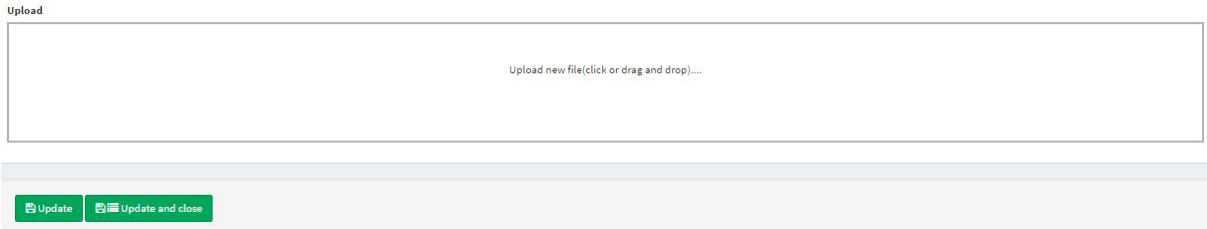



Then, please specify the name of the  fund that this Dataroom is dedicated to:


Please also name the dataroom, describe it briefly and select the language of the documents.

Once this is done, click on the “Create”. Please note that you can only upload documents after creating the dataroom.

Then, you can either drag and drop documents or click to browse your computer, and select the file you want to upload. Validate your upload by clicking on “Update”

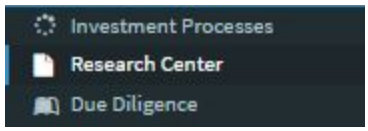



At the moment, many Pdf documents can be uploaded in a single Due Diligence, but each file cannot exceed 2 Megabytes. We are currently working on extending this capacity to other file format (excel, word...) and greater document size.

VERY IMPORTANT : the dataroom is currently opened to all investors. The enabling of the Restricted Access functionality is planned for June. As a consequence, please only upload non-confidential information into the dataroom for now.

## III) LISTING RESEARCH DOCUMENTS IN THE RESEARCH CENTER

You can access to the list of Research documents from your company in this menu :




You can add new Research Documents to the platform, edit and list them from there.

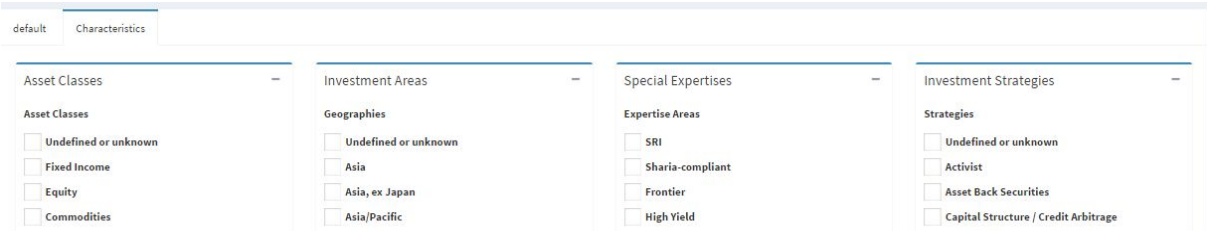
To create a Research Document on the platform, please use the “Add new” function :


Then please name it, add the Investment summary and select the language of the document.

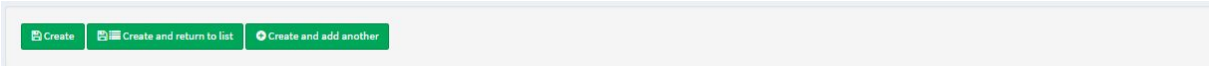

You have the possibility to link each Research Document to one or several of your Products that are already listed on the platform. Please type the name of those funds in “Products” field :


Please note that once the document is created, you can still attach new products (which would be added later) to this document by using its “Edit” function.

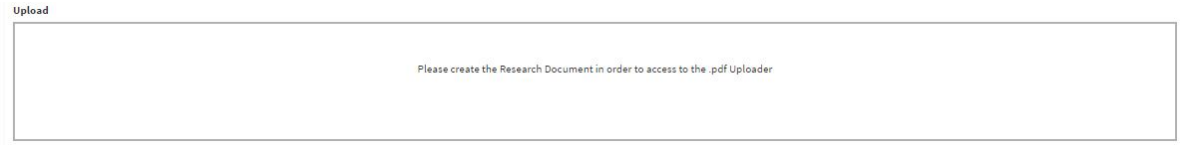
When switching to the “Characteristics” tab, please select the right tags that best fit your document, to make it more visible and searchable.




Once you finish these steps, please click on the “Create” button.




Please note that you can only upload the pdf file after creating the Research istem.




Then, you can either drag and drop the pdf file or click to browse your computer, and select the file you want to upload. Validate your upload by clicking on “Update”


At the moment, many Pdf documents can be uploaded in a single Research Document, but each file cannot exceed 2 Megabytes. We are currently working on extending this capacity to other file format (excel, word…) and greater document size.