

NEWSLETTER

Global Investment Performance Standards

July 2026

30th Annual GIPS® Standards Conference

Join us on **10–11 November 2026** at the **Loews Philadelphia Hotel** for the **30th Annual GIPS® Standards Conference**. This milestone event will bring together performance and compliance professionals, industry leaders, and regulators from around the world to celebrate 30 years of the conference while exploring the latest developments shaping investment performance.

This year's agenda features expert-led discussions on AI and its impact on performance measurement and reporting, private market trends, SEC examinations, GIPS Standards updates, insights from the GIPS Standards Help Desk, and the complexities of performance (incentive) fees and their impact on net return calculations.

Whether you're looking to stay current on industry developments, hear directly from regulatory and technical experts, or connect with peers, the conference offers valuable learning and networking opportunities for professionals across the investment industry.

Standard registration is now available. [View the agenda and learn more about this year's conference.](#)

The 30th Annual

Global Investment Performance Standards Conference

10–11 November 2026 | Philadelphia, PA



Reminder: Guidance Statement for OCIO Portfolios Now Effective

This is a reminder that the Guidance Statement for OCIO Portfolios became effective on 31 December 2025. Firms that claim compliance with the GIPS® standards and provide both strategic investment advice and investment management services to OCIO Portfolios are expected to apply the Guidance Statement when providing GIPS Reports to prospective OCIO clients.

The Guidance Statement introduces several concepts that are specific to OCIO Portfolios, including required OCIO composites, asset classifications, benchmark considerations, and required return presentations. Firms should ensure that their policies and procedures, composite structures, and GIPS Reports reflect the applicable guidance.

For additional information, please review the [Guidance Statement for OCIO Portfolios](#).



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