NEWSLETTER

Global Investment Performance Standards

September 2026

30 Years of the GIPS® Standards Conference — Join Us in Philadelphia

This November, CFA Institute celebrates a milestone: the **30th Annual GIPS® Standards Conference**, held **10–11 November 2026** at the **Loews Philadelphia Hotel**. Three decades in, this conference remains the industry's go-to gathering for anyone working with the GIPS standards.

Expect two days of technical, practitioner-led sessions covering the following:

- How AI is changing performance measurement and reporting
- The retailization of private markets
- The SEC's current examination priorities
- Asset owner perspectives on GIPS compliance
- Performance and incentive fee structures
- The latest GIPS standards updates straight from the source

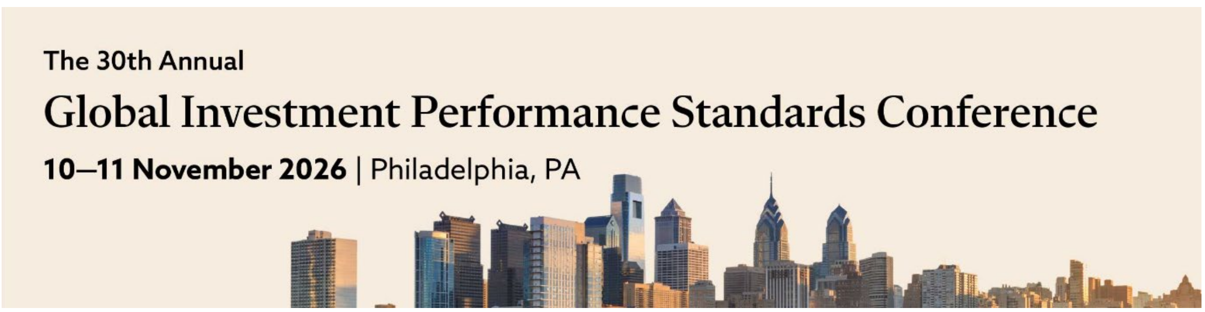
Featured speakers include:

- Julia Reyes, Partner at ACA Performance Services, will discuss the compliance realities firms are navigating right now;

- Duncan Robinson, Director of AI & Optimization and Principal Research Scientist at Franklin Templeton, will share where AI is actually moving the needle in performance reporting; and
- Pete Leibman, Speaker and Author at Stronger Talent, brings a different lens on building habits for high performance.

Whether you're a performance analyst, compliance officer, verifier, or asset owner, this is where the profession compares notes on what's changing — and what to do about it.

View the agenda and find out more.

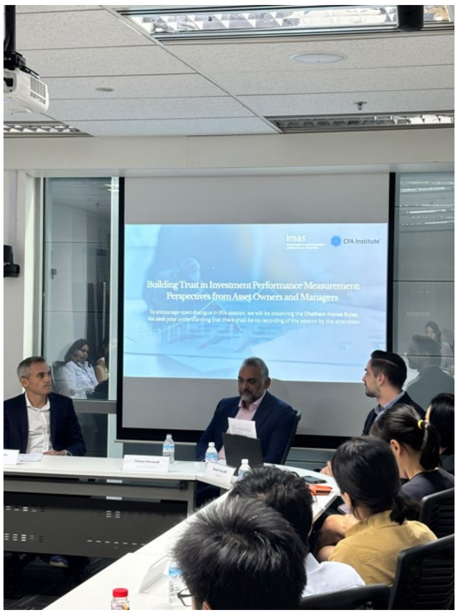


Call for Comments—Exposure Draft of the GIPS Standards Guidance Statement on Trade Errors

The GIPS standards have historically required firms to have a GIPS standards error correction policy. The Exposure Draft of the Guidance Statement on Trade Errors (“Exposure Draft”) introduces a new type of error policy: a GIPS standards trade error policy and provides guidance with respect to how trade errors may be treated for performance purposes.

The Exposure Draft is available for public comment for 90 days. Comments may be submitted by email to standards@cfainstitute.org and must be received by 15 December 2026. Unless otherwise requested by the submitter, all comments will be made public on the GIPS standards website.

Building Trust in Investment Performance Measurement: Singapore Roundtable Discussion



On 20 August, Investment Management Association of Singapore (IMAS) and CFA Institute co-hosted a panel discussion and interactive roundtable exploring how leading investment organizations build trust through strong governance, transparent reporting, and robust approaches to measuring long-term investment performance.

The event brought together investment professionals from GIPS-compliant organizations and organizations considering compliance with the GIPS standards.

Through a combination of expert perspectives and practitioner experiences, the session examined how, in addition to technical compliance, the GIPS standards support fair representation, full disclosure, greater comparability of investment performance, and discipline in reporting investment performance.

The event opened with recorded remarks from Ken Robinson, CFA, CIPM, Director, Investment Practice & Standards at CFA Institute. The roundtable discussion brought together Trevor Persaud, former Chair of the GIPS Standards Executive Committee and Group Head of Investment Strategy and Solutions at AIA Investment Management Private Limited; Cedric Torres, CIPM, Director, Risk at Eastspring Investments (Singapore) Limited; and David von Eiff, PhD, Director, APAC Marketing at CFA Institute. Together, they shared practical perspectives on how performance information supports oversight, manager selection, institutional accountability, and long-term decision-making.

While investment performance remains central, the way performance is measured, governed, explained, and reported is increasingly important for maintaining confidence among clients, beneficiaries, boards, regulators, and other stakeholders.

The roundtable format encouraged candid discussion, peer learning, and direct engagement between GIPS-compliant organizations and prospective adopters. Participants discussed the benefits and challenges of adoption, addressed common misconceptions and practical implementation considerations, and provided an Asian perspective on adoption and implementation.

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