



NEWS RELEASE

# DFIN Completes Its First Tailored Shareholder Reports Test Filing Through ArcReporting

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CHICAGO, April 23, 2024 /PRNewswire/ -- **Donnelley Financial Solutions** (NYSE: DFIN), a leading provider of risk and compliance solutions, today announced it has met another major milestone in advance of the July 24 compliance deadline for the Tailored Shareholder Reports (TSR) rule. DFIN, the provider of industry-leading financial software, successfully test filed a full Form N-CSR based on the new regulatory requirements, including an iXBRL-tagged TSR, via its proprietary SaaS solution ArcReporting® to the U.S. Securities and Exchange Commission (SEC) on behalf of an asset manager. Building on our previous success through traditional filing services, this is a demonstration of the dynamic, end-to-end, straight-through processing that DFIN's Arc Suite® offers our valued clients as they can now create, file, web host and distribute complex financial reports — all from a single platform.

The SEC adopted the TSR regulation as part of its continued effort to modernize and simplify shareholder communications. It requires significant changes to both the content and the presentation of information to create standardized and visually engaging shareholder reports. The TSR compliance date is July 24, 2024.

The TSR solution is available to clients of ArcReporting, DFIN's industry-leading financial reporting product. As part of the Arc Suite platform, ArcReporting provides a robust set of functions designed to boost productivity, enhance audit trails, minimize handoffs, and mitigate risk when producing financial statements.

"Leveraging the power of ArcReporting to test file a full Form N-CSR and iXBRL-tagged TSR validates DFIN's commitment to our customers to provide an automated and scalable solution that fulfills the SEC's TSR requirements," said Floyd Strimling, DFIN's Chief Product Officer.

DFIN is the largest SEC EDGAR filer by number of filings annually, with nearly 40% of investment company filings on an annual basis. Similarly, DFIN leads the market in iXBRL tagging and filing. And its Arc Suite products, combined with traditional and managed offerings, ensure regulatory compliance globally for its customers.



## About DFIN

DFIN is a leading global provider of innovative software and technology-enabled financial regulatory and compliance solutions. We provide domain expertise, enterprise software, and data analytics for every stage of our customers' business and investment lifecycles. Markets fluctuate, regulations evolve, technology advances, and through it all, DFIN delivers confidence with the right solutions in moments that matter. Learn about DFIN's end-to-end risk and compliance solutions online at [DFINSolutions.com](https://www.dfinsolutions.com), or you can also follow us on X (formerly Twitter) [@DFINSolutions](https://twitter.com/DFINSolutions) or [LinkedIn](https://www.linkedin.com/company/dfin).

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