



New Study Shows American Funds, iShares, and Prudential Having Strongest Connections with Advisors

Cambridge, Mass., (October 20, 2010) -- A recent survey by Cogent Research reveals that American Funds, iShares, and Prudential Financial lead other providers in creating strong connections with individual advisors. However, while Prudential has strengthened its grip on advisors in the variable annuity space over the past year, American Funds and iShares face increasing challenges from other mutual fund and ETF providers. These and other findings are contained in a new report, *Advisor Touchpoints 2010™*, which was released by Cogent this week.

The report, based on a nationally representative survey of over 1,500 registered advisors, finds that the proportion of advisors who name Prudential as the variable annuity provider doing the best job keeping them feeling “personally connected to the company, its products, and services,” increased over the past year from 14% to 18%. Meanwhile, second-ranked Jackson National at 12% saw no change, and is being challenged by third place Sun Life Financial which experienced a dramatic increase in the proportion of advisors naming it as the firm to which they feel most connected, up seven percentage points from 2% in 2009 to 9% in 2010.

Among mutual fund producers, 19% of advisors this year indicate that American Funds does the best job making them feeling connected, compared to 23% of advisors who felt this way one year ago. In the same time period, the proportion of advisors who identify Franklin Templeton Funds as the company doing the best job making them feel connected doubled, from 7% to 14%. Meanwhile, BlackRock and Fidelity Advisor funds, cited less often by advisors, also experienced similar substantial proportional increases.

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While iShares at 32% continues to dominate the ETF landscape as the provider with the greatest number of strong connections with advisors, several other providers including PowerShares, ProShares, and Vanguard have made notable gains in the proportion of advisors who feel these firms do the best job making them feel connected.

In addition to identifying best-in-class performance and rankings for firms across a range of critical communication touchpoints, Cogent Research employed Emotion Mining™, a groundbreaking new research methodology to better understand the emotions that lead to strong bonds with providers.

“It’s long been understood that emotionally compelling marketing and communications are more likely to strengthen bonds with advisors and lead to greater financial returns,” said Cogent Research Principal Christy White. “What Emotion Mining™ allowed us to do was to identify concrete actions that evoke and enhance those emotions.”

Strongest Advisor Connections

Mutual Fund Rankings:

1. American Funds
2. Franklin Templeton Funds
3. BlackRock Funds
4. Fidelity Investments
5. PIMCO Funds

ETF Rankings:

1. iShares
2. PowerShares
3. ProShares
4. Vanguard
5. Spiders/State Street

Variable Annuity Rankings:

1. Prudential
2. Jackson National
3. Sun Life Financial
4. Lincoln National
5. AXA/MONY

Source: Cogent Research Advisor Touchpoints 2010™

About Cogent Research

Cogent Research helps clients gain clarity, obtain perspective, and formulate direction on critical business issues. Founded in 1996, Cogent provides custom research, syndicated research products, and evidence-based consulting to leading organizations in the financial services, life sciences, and consumer goods industries. Through quality research, advanced analytics, and deep industry knowledge, Cogent Research delivers data-driven solutions and strategies that enable clients to better understand customers, define products, and shape market opportunities in order to increase revenues and grow the value of their products and brands.

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