

## THE ACTIVE TRADER™ 2012

*Profiling the affluent active trader*

This study explores the trading experience, behavior, and brand perceptions of affluent self-directed investors towards online brokerage providers and their trading platforms. The report reviews which services and tools are most desirable, what drives provider platform selection, and which factors influence individual trading decisions.

### ***This report will enable executives:***

- *Identify strengths and weaknesses of key competitors*
- *Optimize platform and message strategies to increase loyalty*
- *Segment investors by critical attributes and behavior markers*

### Areas of Inquiry

#### **Brand Consideration & Perceptions**

- Aided brand awareness
- Association with six key platform brand imagery attributes
- Perceptions among clients and prospects

#### **Platform Provider Satisfaction**

- Evaluate active trader experience across 11 online trading platform attributes
- Identify the key drivers of active trader satisfaction
- Pinpoint which brands have the highest active trader satisfaction levels
- Measure intent to open new self-service online trading accounts in next six months

#### **Trading Platform Usage**

- Explore active trader platform usage and penetration
- Identify which trading platforms are preferred
- Measure overall share of trading activity

#### **Individual Trading Criteria**

- Uncover which factors have the greatest influence on individual trading decisions
- Identify the types of assets used in online trading accounts (“long-term” vs. “short-term”)

### Methodology

Data was collected via a web-based survey of a representative sample of more than 500 affluent investors who trade at least 36 times per year, with a minimum of \$100,000 in investable assets (excluding real estate). Data collected in October 2011.

### Deliverables: December 2011

- Detailed PowerPoint report
- 3 hardcopies of the study

**Research Investment:** \$7,500

**For more  
information contact:**  
[info@cogentresearch.com](mailto:info@cogentresearch.com)  
617-441-9944

125 CambridgePark Drive  
Cambridge, MA 02140  
PH 617-441-9944  
FX 617-441-9966

[www.cogentresearch.com](http://www.cogentresearch.com)  
[info@cogentresearch.com](mailto:info@cogentresearch.com)



#### **Custom Research**

Our custom research produces “actionable insights” that inspire decisions and drive behavior. Solutions include customer loyalty, brand assessment and tracking, product development, and customer acquisition and retention modeling.



#### **Syndicated Research**

The most up-to-date, comprehensive understanding of emerging issues and trends lets us continuously generate insight and action strategies for clients. Products and services include research briefs, syndicated reports, and sponsored papers.

#### **Evidence-based Consulting**

Our own proprietary data assets combined with client supplied information and primary research to produce powerful insights and recommendations toward product, trend, and client experience. The result is significantly improved bottom-line performance.