

ALTERNATIVE INVESTMENT TRENDS™ 2011

Evaluating the usage and role of alternative investment products

Alternative Investment Trends™ 2011 explores financial advisor usage and attitudes toward alternative investment products and strategies. It identifies preferred alternative solutions, barriers to usage, and the strategic role in client portfolios. It also measures awareness and perceptions of alternative investment product providers.

This report will help executives

- Target the most relevant opportunities within the alternative investment product arena
- Identify drivers and barriers for alternative investment product usage
- Position alternative investment products for optimal adoption
- Benchmark the perceptions of their brand as an alternative investment provider

Areas of Inquiry

User Profile – Who are the alternative investment product users? How much AUM do they manage? How much AUM is allocated to alternative investment products? Which channels sell the most alternative investments?

Existing and Future Product Usage – Which alternative investment products are being used today? Which products and strategies offer the most opportunity in the next 12 months?

Portfolio Construction and Attitudes – What is the primary role of alternative investments in client portfolios? What is the advisor's primary portfolio role?

Barriers to Usage – Why are producers not utilizing alternative investments? What are the barriers to increasing usage among active alternative investment users?

Provider Perceptions – Which mutual fund and ETF providers are most associated with offering a broad range of alternative products? Which boutique providers are advisors aware of? Which providers do advisors prefer for alternative investment products?

Methodology

Alternative Investment Trends™ data were collected via a web-based survey among a national representative sample of 1,643 registered financial advisors.

Data were collected in April 2011.

Deliverables: November 2011

- Detailed PowerPoint report
- 3 hardcopies of the study

For more
information contact:
info@cogentresearch.com
888-962-3312

Research Investment: \$9,500

Custom Research

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

www.cogentresearch.com
info@cogentresearch.com

