Discovery Series
SYNDICATED RESEARCH

ADVISOR TRENDS IN ASSET CLASS MIX ™: 2010

New in 2010, Cogent Research introduces Advisor Trends in Asset Class Mix™, an up-close look at both mutual fund use and investment allocation trends occurring inside the books of today's advisors. The report examines, in detail, the current distribution of mutual fund assets across both domestic and international fixed income and equity managers. It also reveals advisors' specific "go-to" providers for the eighteen Morningstar U.S. domestic equity and fixed income style boxes.

INSIDE THE REPORT

This report will help executives:

- Pinpoint differences in mutual fund asset class allocations by key advisor demographics
- Indentify opportunities to capitalize on current advisor provider preferences
- Fine-tune channel distribution strategies
- Leverage current category strengths to expand product offerings

Overall Mutual Fund Usage Trends

- What proportion of advisors' mutual fund assets are currently actively managed versus passively managed?
- What is the role and impact of ETFs on advisors' fixed income investing?
- How does mutual fund use vary based on advisor channel and practice models?
- What proportion of mutual fund assets are currently invested in target date or money market funds?

Current Equity and Fixed Income Allocations

- What is the overall blend of fixed income and equity mutual fund assets, and how are funds allocated across domestic and international funds?

"Go-To" Providers

- What specific asset managers are advisors most reliant upon for U.S. Domestic asset classes and fixed income strategies?
- Overall, what providers are advisors turning to most often for International fixed income and equity investment solutions?
- What differences exist in asset manager preferences by channel, AUM, and level of commitment to mutual funds overall?
- How often and for what asset classes are advisors using managers other than their primary mutual fund provider?

METHODOLOGY

Data collected via web-based survey among a representative sample of 1400 advisors with an active book of at least $5 million AUM. Data collection in April/May 2010.

DELIVERABLES

Detailed PowerPoint style report, including a summary of findings as well as implications for investment product and service providers.

Research Investment: $9,500 USD

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