

Advisor Pulse Research Series

Uncovering advisor perspectives on key market trends and industry topics.



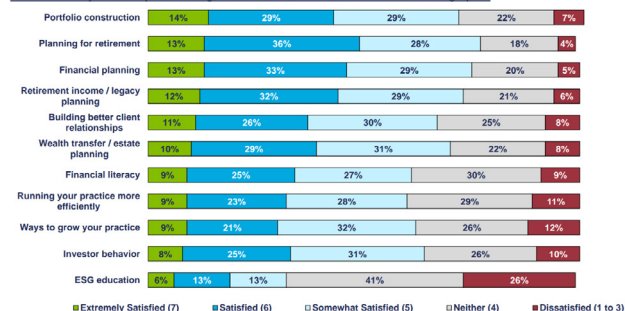
ISS MI's topical research reports provide unique and timely advisor perspectives on the intermediary-sold asset management landscape, through quantitative and qualitative interviews with advisors across the wirehouse, regional, independent, bank broker/dealer and RIA channels.

Key Benefits

- › Understand advisor perspectives on key market trends and industry topics
- › Align strategies with advisors' product and distribution preferences
- › Understand implications for gaining distribution shelf space
- › Drive enhanced advisor engagement based on what advisors value most
- › Deliver the right content, through the right channels, at the right frequency
- › Effective targeting through advisor profiling
- › Findings available within weeks of data collection to provide fresh and timely advisor perspectives

The level of satisfaction with the current practice management and value-add content available varies, leaving an opportunity for asset managers to help advisors

How satisfied are you with the practice management and value-add content available on the following topics?

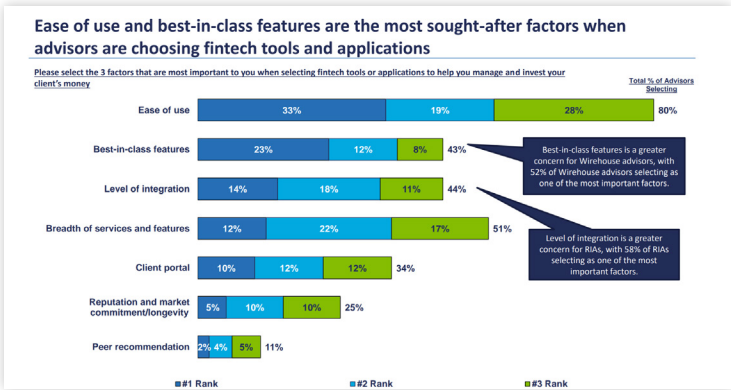
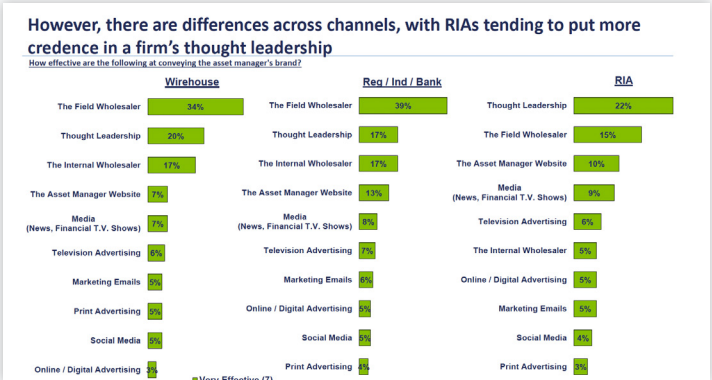


PRACTICE MANAGEMENT

In-depth review of topics relating to advisor practice management including perspectives that inform how asset managers can create, optimize and deliver value add content to advisors.

BRAND PERCEPTION AND PODCASTS

Advisor perspective on the importance and drivers of brand and their impact on asset managers' distribution effectiveness and advisor engagement.

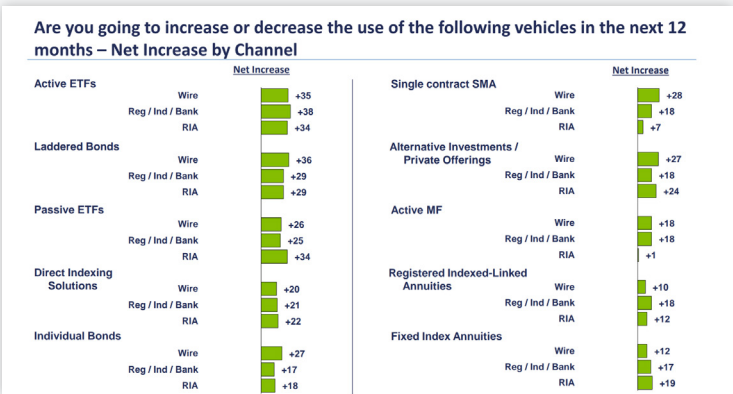


FINTECH

Overview of advisors' use of fintech tools and applications, and ratings of the most important solutions with detailed input on platform features and capabilities.

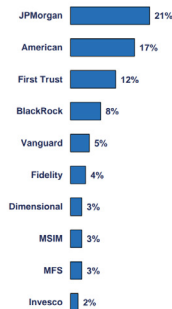
VEHICLES AND PORTFOLIO CONSTRUCTION

In-depth overview of trends in advisor portfolio construction including a behavioral overview on the use of specific products and vehicles, and asset manager selection processes.



Top-tier and strong brand firms lead best practices in delivering content driven by timely, relevant, and client-friendly insights

Please name the asset manager you believe provides the best educational content/ thought leadership overall?



Why does educational content / thought leadership stand out?

- "JPM CIO David Kelly provides superb commentaries on the markets on a weekly basis. It's original and not regurgitated material that I often see with other commentaries." - [JPMorgan](#)
- "They have podcasts as well as articles I find useful." - [JPMorgan](#)
- "They have a good mix of virtual, in-person, social media, and email content. Conference calls, whitepapers, product updates, strategist commentary, wholesaler support, etc." - [JPMorgan](#)
- "Polished presentation, easily understandable by clients." - [American](#)
- "Their educational content is clear concise and easy to share a client." - [American](#)
- "Most of their Management has been with CG for a very long time and they have experienced a lot of the things associated with market activity. Their advice has always been helpful, and I rely on their insight and experience to advise my clients." - [American](#)
- "They send out material weekly that is relevant with economic data and market commentary that is concise and easy to read and great to share." - [First Trust](#)
- "The depth of their content quality and quantity exceed every other manager I do business with. They are consistent in their approach and timing. Their wholesale team works across products to get advisors to learn." - [First Trust](#)
- "Regular, timely, detailed information that is not only immediately useful but very reliable. Brian Windbury is a great source together with the other team members there." - [First Trust](#)
- "They are the largest asset manager so one would think they have a unique insight into what is going on." - [BlackRock](#)
- "It is very broad and global in scope and tends to touch on many significant points of interest that would be relevant to clients." - [BlackRock](#)
- "I use their RICED and BRET products so I keep tabs on those and they send out a lot of information and conference call opportunities with their AI sleeve. I also implement some of their open-ended mutual funds and ETF's through iShares." - [BlackRock](#)

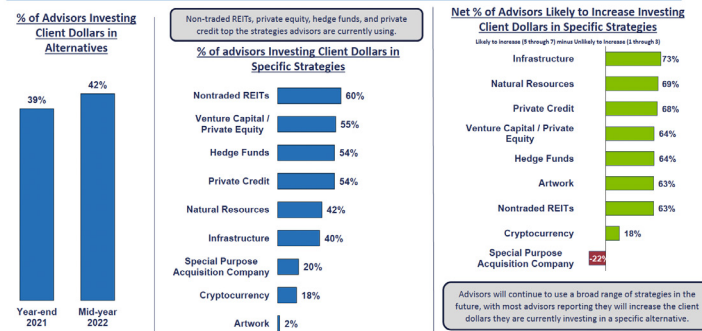
MARKETING, DIGITAL CONTENT AND SALES REPORT

Advisor perspectives to inform effectiveness of asset managers' marketing and investment content with specific focus on digital content, marketing channels and tools including websites, and field sales support.

ADVISOR USE OF ALTERNATIVES

Advisor perspectives on the alternative investments landscape, and related trends, including perceptions of and use of various types of alternatives, recommendations within client portfolios and obstacles to usage.

Interest in alternatives is rising, but advisors are cautious, with 42% investing client dollars in alternatives, up slightly in the first half of 2022



Methodology and Approach

ISS MI's MarketPro Powered by Discovery Data advisor and intermediary database serves as the foundation for our advisor survey research. Each report integrates input from over 700 advisor surveys, supplemented by over two decades of historical data, trend analysis and deep industry expertise, to provide firms with actionable data-driven intelligence to optimize decision making and performance.

[Request Access to Advisor Pulse](#)

ISS MI About ISS Market Intelligence

ISS Market Intelligence (MI) is a leading provider of data, insights, and market engagement solutions to the global financial services industry. ISS MI empowers asset and wealth management firms, insurance companies, distributors, service providers, and technology firms to assess their target markets, identify and analyze the best opportunities within those markets, and execute on comprehensive go-to-market initiatives to grow their business. Clients benefit from our increasingly connected global platform that leverages a combination of proprietary data, powerful analytics, timely and relevant insights, in-depth research, as well as an extensive suite of industry-leading media brands that deliver unmatched market connectivity through news and editorial content, events, training, ratings, and awards.