Smarter Engagement Strategies Would Benefit Asset Managers and Their Clients

April 15, 2016

Executive Summary:

The results of Greenwich Associates 2015 U.S. Institutional Investors Study show that despite 3% growth in portfolio assets, funding levels for U.S. pension funds were flat from 2014–2015 at well below desirable levels. Meanwhile a spike in market volatility accentuated the formidable challenge facing institutions of all types: achieving the investment returns needed to fund liabilities and overall organizational needs while also managing risk.

Methodology:

Between July and October 2015, Greenwich Associates conducted 1,341 interviews with senior professionals at corporate and union funds, public funds, endowments and foundations, insurance general accounts, and healthcare organizations with either pension or investment pool assets greater than $250 million. Study participants were asked to provide quantitative and qualitative evaluations of their investment managers, qualitative assessments of those managers soliciting their business, and detailed information on important market trends.

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