Embracing Institutional Investors' New DNA

Leverage Unique Segmentation Models to Boost Perceptions of Quality

November 7, 2016

Executive Summary:

Asset managers working to refine their strategies to leverage their competitive advantages and embrace their business model will benefit in a competitive market. By carefully determining the optimal institutional prospects, setting clear and realistic expectations, and aligning internal resources to efficiently serve investors, it becomes a win-win situation—making retention easier and boosting the manager's reputation in the marketplace.

Methodology:

Respondents include 1,341 individuals from 1,128 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate and union funds, public funds, and endowment and foundation funds, with either pension or investment pool assets greater than $150 million.

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growth, culture of innovation, and global footprint.

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