

2018 Portfolio Trading

2018 North American Equity Investors

May 18, 2018

Executive Summary:

This report provides detailed information from North American-based investors regarding portfolio trading, including helpful benchmark data such as:

- Portfolio trading volume and mix, by underlying market
- High-touch vs. e-trading mix trends
- Mix of agency vs. risk business
- Most important selection criteria for agency portfolio trading

Methodology:

This report provides detailed information on cash equities markets according to buy-side firms located in North America regarding portfolio trading. Research is based on in-person and telephone interviews with 56 respondents in the 2018 Study. The data in this report is based upon aggregated results from individuals participating in the study.

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greenwich.com

ContactUs@greenwich.com

Ph +1203.625.5038