



INVESTOR TRACKER



Track and monitor investor behaviour, sentiment & trends

Each quarter we survey over 1,500 investors, analysing:

Ownership

- cash accounts and investments
- tax wrappers
- funds and shares

Sentiment

- personal financial situation
- the UK economy
- the global economy
- investor confidence

Intentions

- asset class preference
- active or passive
- buying and trading intentions
- ESG and sustainable plans

Brand

- awareness (asset manager)
- awareness (platform)
- considered brands for future purchase
- ESG consideration

Value

- for 30 leading asset management brands
- Quality of Service score
- relative value ranking to peers
- Value scores for performance and price

Investor Tracker is used by:

- PR TEAMS
market sizing/
investor data/
trends
- FUND BOARDS
track customer
value ratings
- MARKETING
TEAMS
- PROPOSITION
TEAMS

- All data can be segmented by age, gender and household income.
- The report is delivered on a quarterly basis in PowerPoint.
- A minimum subscription is for one year and costs £4,000 per quarter.
- Please ask us about any ad hoc requests.

boringmoneybusiness.co.uk/subscriptions/investor-tracker

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2. Ownership

- Overall investing landscape – number of investors by type in the population
- Investments held – number of account holders by tax wrapper
- Fund investor overall approach – passive v. active
- Fund investor approach over time – passive v. active
- Fund type owned – stated ownership by 10 fund asset type categories
- Fund type owned by advice usage

3. Sentiment

- Expectations for personal financial situation – improve, neutral or declining
- Expectations for UK economy – improve, neutral or decline
- Expectations for Global economy – improve, neutral or decline
- Expectations for UK markets – predicted change in value of FTSE

4. Intentions

- Net buying intention – increasing or decreasing investment
- Current buying consideration by fund type – by 10 fund asset type categories
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5. ESG

- Change in attitude to ESG over time
- Perceived ESG performance by brand

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- Fund manager brand awareness – amongst fund investors, over time, 30 fund brands
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- Fund manager consideration for purchase – 30 fund brands
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7. Value

- Overall perception of brand value by fund owners – 30 brands over time
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- Quality of service rating by fund owners – 30 brands over time
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- Quality of service by age and gender
- Rating of price, performance, and clarity by fund owners
- Rating of price, performance, and clarity by advice use, age and gender
- Reasons given for fund perception by fund owners