

Three asset management trends gaining momentum

The COVID-19 crisis has left an indelible mark on investors, financial advisors and asset management firms. It's changed advisor needs and expectations, possibly forever.

The pandemic has also accelerated three key distribution trends that were already gaining momentum. Asset managers need to quickly align their resource allocation and advisor-engagement strategies with the "new normal".

TREND 1:

Model adoption is predicted to increase significantly.



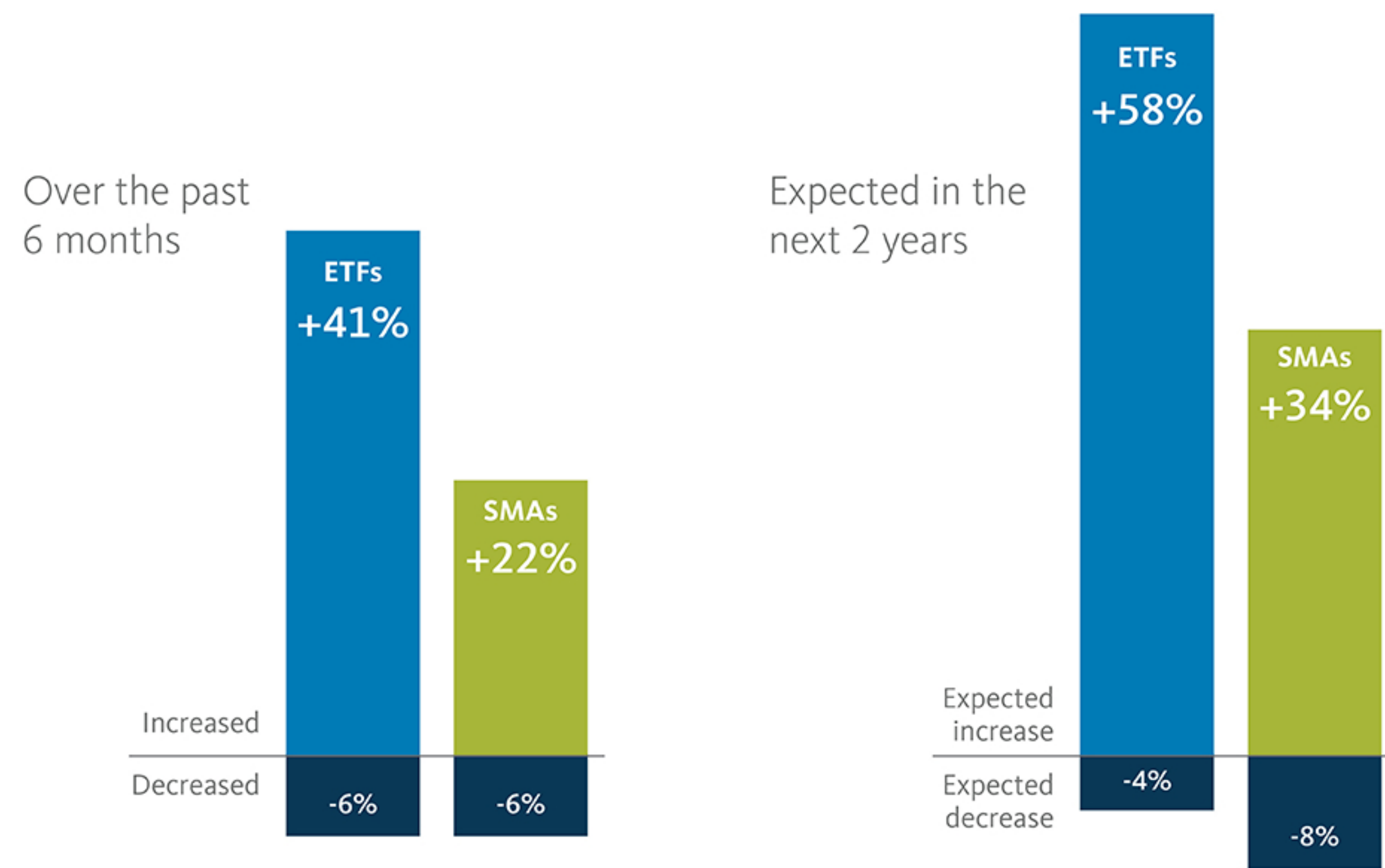
"I can't consistently beat the model strategies that are out there. So, I focus on practice efficiencies. That way I can try to lower my fees and put more money in my clients' pockets."

– Independent Broker-Dealer

TREND 2:

ETFs and Separately Managed Accounts (SMAs) are expected to gain a larger percentage of AUM share.

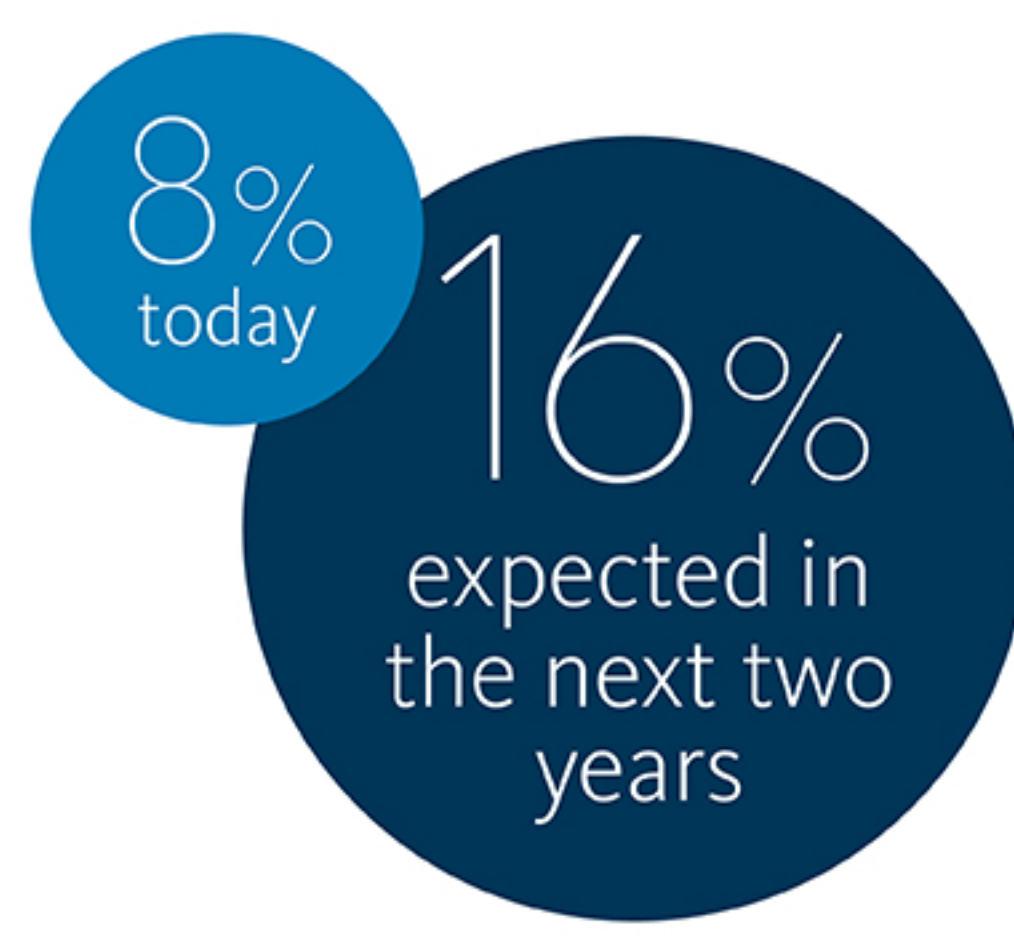
% OF ADVISORS CHANGING ALLOCATION IN EACH PRODUCT



TREND 3:

Demand for ESG products is rising fast.

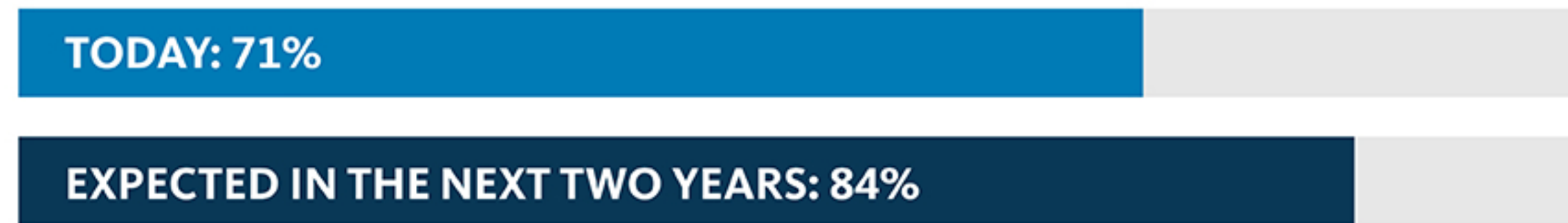
MEAN % OF CLIENTS WITH ASSETS IN ESG PRODUCTS



MEAN % OF TOTAL AUM INVESTED IN ESG PRODUCTS



% OF ADVISORS WITH AUM IN ESG PRODUCTS



Stay on top of the trends.

Find out how advisors will move beyond 2020, and how asset managers can adjust to this "new normal."

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