Evolving Portfolio Construction and Active ETF Decision Framework

Today's asset management landscape is highly competitive and product development decision making is complex. The Evolving Portfolio Construction and Active ETF Decision Framework Report addresses many key product strategy and development challenges that asset managers face.

The report is powered by ISS MI's advisor sentiment and behavioral research, and our proprietary business intelligence, data and analytics platforms - synthesized through the unique vantage point of deep industry, market and product expertise.

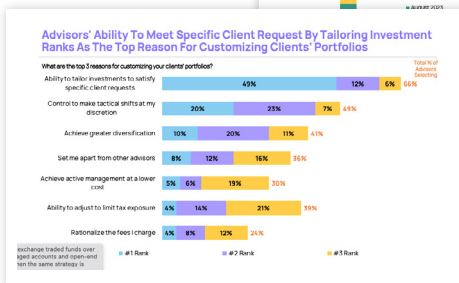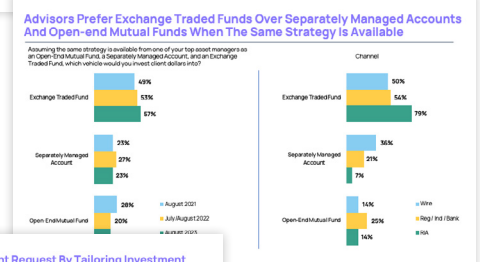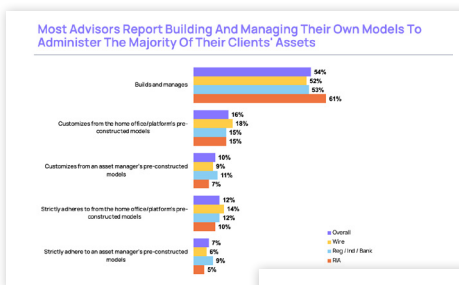## Report Overview: Key Takeaways and Benefits

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The report provides an overview of asset management product strategy informed by market trends, the evolution of advisor portfolio construction, and special focus on the active ETF market with in-depth analysis of:

› Key product development and prioritization considerations faced by asset managers

› Evolving advisor portfolio construction and vehicle use

› Decision framework for entering or expanding into the active ETF market

Benefits for Asset Managers

› Capture assets as money shifts from the sidelines back into long-term investments

› Understand how advisor portfolio construction is evolving and the opportunity for active ETFs

› Optimize market entry strategy for active ETFs

To learn how you can access the report, visit our landing page.

Informed by Proprietary Data, Analytics and Expertise

ISS MI's research reports are powered by our proprietary research studies and data platforms.
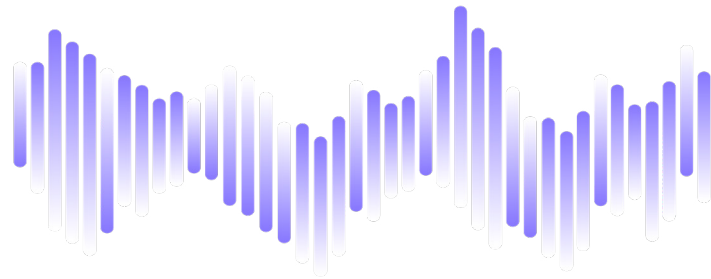
These include our ongoing series of pulse reports that from the *Selling Retail Investment Products Through Intermediaries* research series, data and analytics from ISS MI's Simfund and Flowspring business intelligence and analytics platforms, and ISS MI's deep market, industry and product subject matter expertise.

See reverse side for more details.

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Global Research & Advisory Solutions

Powered by proprietary databases, published research and in-person presentations, the Global Research & Advisory Solutions team delivers advanced data analytics, comprehensive market intelligence and insightful thought leadership to help clients identify product and distribution opportunities, monitor trends and make strategic decisions to thrive in the highly competitive asset management business.

ISS MI Market Metrics Sentiment & Behavior Research provides a unique combination of custom analytics and survey-driven market intelligence covering advisor-sold investments and insurance. Driven by a powerful combination of high quality market research, peer benchmarking, custom consulting, extensive industry experience and advanced data analytics, the research studies reveal data-driven insights that provide firms with actionable intelligence to optimize decision making and performance.

Selling Retail Investment Products Through Intermediaries Research subscribers receive:

Bi-monthly pulse surveys that examine advisor needs and opinions on a variety of topical and thematic issues informed by over 10,000 advisor surveys annually.	Semi-annual in-depth surveys to determine advisor needs, behaviors, and satisfaction with their top asset manager relationships.

Access to special topical reports.

The ISS MI Simfund platform is the premier cloud-based platform integrating the industry's best-in-breed proprietary and third-party datasets for advanced business intelligence. Simfund's data, analytics and insights cover 120,000 financial products and funds across 45 markets representing over $100 Trillion in AUM.

Flowspring is an industry-leading analytics platform with machine-learning driven insights that provides asset managers with unparalleled predictive analytics and insights regarding fund flows and competitive intelligence, that enables improved product, marketing and distribution decision-making.

For more information, visit our landing page below.

ISS MI
MARKET INTELLIGENCE

About ISS Market Intelligence

ISS Market Intelligence empowers the global financial services industry to assess target markets, identify opportunities for growth, and execute comprehensive go-to-market initiatives to achieve success.

Our increasingly connected global platforms leverage a combination of proprietary data, powerful analytics, timely and relevant insights, in-depth research, and industry-leading media brands.

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