

# Advisor Pulse Research Series

Uncovering advisor perspectives on key market trends and industry topics.

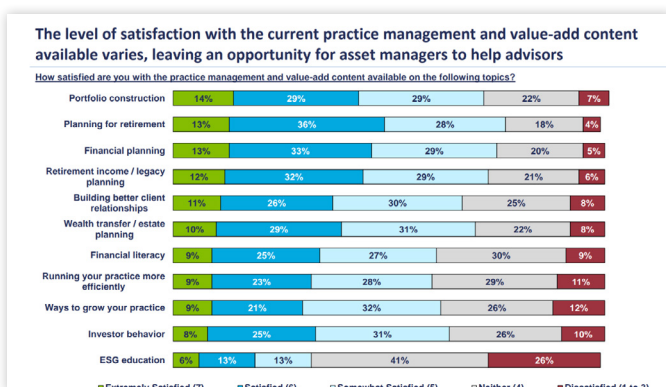


ISS MI's topical research reports provide unique and timely advisor perspectives on the intermediary-sold asset management landscape, through quantitative and qualitative interviews with advisors across the wirehouse, regional, independent, bank broker/dealer and RIA channels.

## Key Benefits

- › Understand advisor perspectives on key market trends and industry topics
- › Align strategies with advisors' product and distribution preferences
- › Understand implications for gaining distribution shelf space
- › Drive enhanced advisor engagement based on what advisors value most
- › Deliver the right content, through the right channels, at the right frequency
- › Effective targeting through advisor profiling
- › Findings available within weeks of data collection to provide fresh and timely advisor perspectives

## Previous Reports



### PRACTICE MANAGEMENT AND ESG

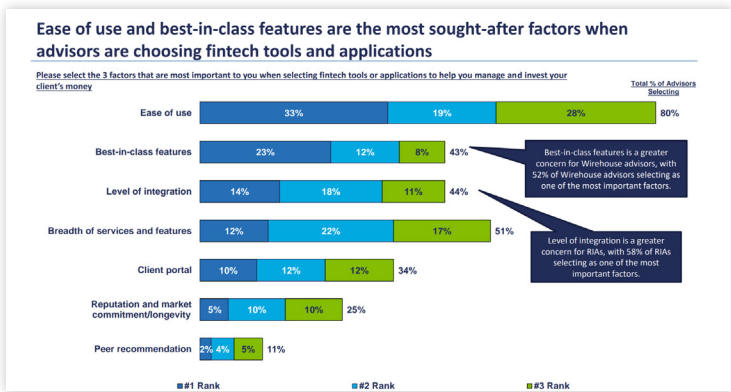
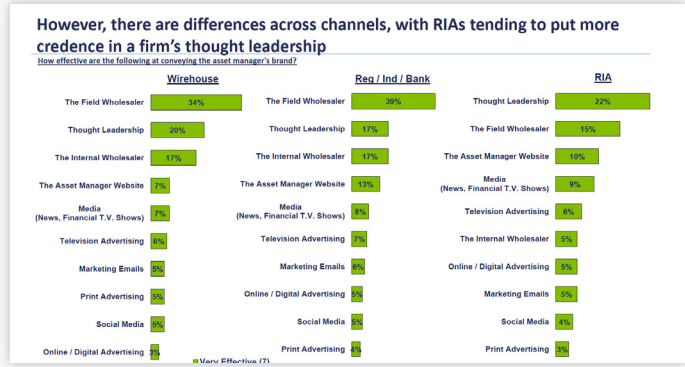
In-depth review of topics relating to advisor practice management including perspectives that inform how asset managers can create, optimize and deliver value add content to advisors. Special section on advisors and ESG investments including usage and likelihood to recommend to clients.

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## Previous Reports

### BRAND PERCEPTION AND PODCASTS

Advisor perspective on the importance and drivers of brand and their impact on asset managers' distribution effectiveness and advisor engagement. Special report sections provide added input on podcast content effectiveness and advisor contact preferences.

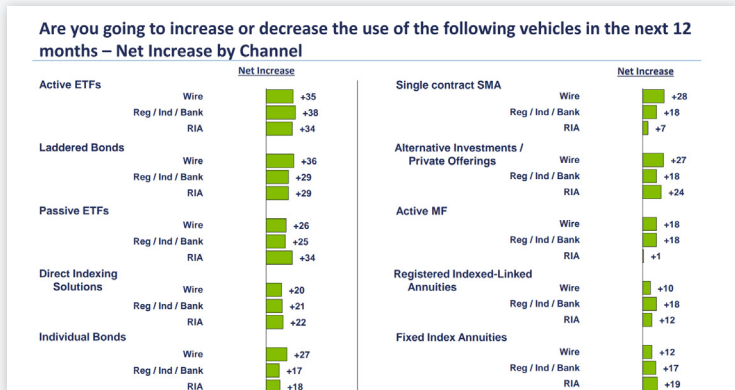


### FINTECH

Overview of advisors' use of fintech tools and applications, and ratings of most important solutions. Includes rankings of top fintech solutions used and detailed input on platform features and capabilities.

### VEHICLES AND PORTFOLIO CONSTRUCTION

In-depth overview of trends in advisor portfolio construction including a behavioral overview on the use of specific products and vehicles, and asset manager selection processes, with a deep dive on direct indexing. Also includes an update on advisor contact preferences.



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## Previous Reports

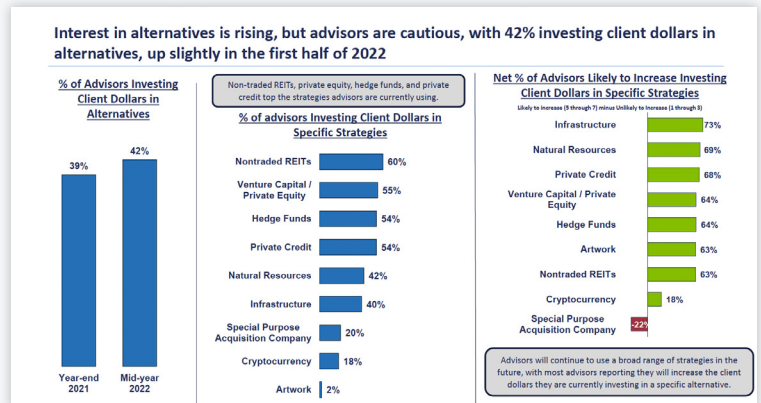


## MARKETING, DIGITAL CONTENT AND SALES REPORT

Advisor perspectives to inform effectiveness of asset managers' marketing and investment content with specific focus on digital content, marketing channels and tools including websites, and field sales support. Special section on trends in cash/cash alternative allocations within client portfolios.

## ADVISOR USE OF ALTERNATIVES

Advisor perspectives on the alternative investments landscape, and related trends, including perceptions of and use of various types of alternatives, recommendations within client portfolios and obstacles to usage.



## Methodology and Approach

ISS MI's MarketPro Powered by Discovery Data advisor and intermediary database serves as the foundation for our advisor survey research. Each report integrates input from over 700 advisor surveys, supplemented by over two decades of historical data, trend analysis and deep industry expertise, to provide firms with actionable data-driven intelligence to optimize decision making and performance.

[Request Access to Advisor Pulse](#)

### About ISS Market Intelligence

ISS Market Intelligence (MI) is a leading provider of data, insights, and market engagement solutions to the global financial services industry. ISS MI empowers asset and wealth management firms, insurance companies, distributors, service providers, and technology firms to assess their target markets, identify and analyze the best opportunities within those markets, and execute on comprehensive go-to-market initiatives to grow their business. Clients benefit from our increasingly connected global platform that leverages a combination of proprietary data, powerful analytics, timely and relevant insights, in-depth research, as well as an extensive suite of industry-leading media brands that deliver unmatched market connectivity through news and editorial content, events, training, ratings, and awards.