



# 2022 U.S. Equities Portfolio Trading Market Highlights

## U.S. Equities - Portfolio Trading

March 31, 2022

### Executive Summary:

This report provides detailed information from U.S.-based equity investors engaged in portfolio trading including helpful benchmark data such as:

- Total spend for execution and research/advisory services
- Mix of electronic vs. high-touch trading volume
- U.S. equity commission rates
- Most important selection criteria for agency portfolio trading

### Methodology:

This report provides detailed information on equity products according to U.S.-based equity investors engaged in portfolio trading. Research is based on in-person and telephone interviews with U.S. equity investors engaged in portfolio trading in the 2022 Study. The data in this report is based upon aggregated results from individuals participating in the study.



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