2023 Key Trends in Institutional Asset Management - United States: Graphics

2023 U.S. Institutional Investors Research

March 15, 2024

Executive Summary:

Despite the public market rebound in 2023, investment outlook remains clouded by macroeconomic and geopolitical uncertainties. Contending with market volatility and optimally positioning their portfolios are by far the top priorities for asset owners.

Methodology:

Coalition Greenwich's 52nd annual research with U.S. Institutional Investors is based on in-depth interviews conducted primarily through telephone interviews and online surveys, between February and November 2023. Respondents include 708 individuals from 575 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate, public, union, and endowment and foundation funds, with either pension or investment pool assets greater than $150 million.

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