2023 Key Trends in the U.S. Institutional Investment Consulting Business

U.S. Institutional Investors Research

May 17, 2024

Executive Summary:

Review the market position of leading investment consultancies in the United States employed by influential institutional investors.

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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