2024 U.S. Equities Portfolio Trading Market Trends

U.S. Equities - Portfolio Trading

December 9, 2024

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 73 U.S. equity investors engaged in portfolio trading in the 2024 Study.

The data in this report is based upon aggregated results from individuals participating in the study.

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