2024 Highlights from Institutional Investors in the U.S.

2024 U.S. Institutional Investors Research

March 25, 2025

Executive Summary:

U.S. institutional investors are making important changes to their portfolios by reducing their exposure to public equities, continuing to shift assets into private markets, and setting aside environmental, social and governance requirements.

Methodology:

Coalition Greenwich's 53rd annual research with U.S. Institutional Investors is based on in-depth interviews conducted primarily through telephone interviews and online surveys, between February and September 2024.

Respondents include 699 individuals from 563 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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