Ways to Win in a New Investment Environment

April 1, 2014

Executive Summary:

The financial crisis had a profound impact on both institutional investors and asset managers. In the wake of the crisis, institutional investors have sought to shore up their portfolios and replenish funding to achieve their objectives.

Asset managers have shifted their business models in response to their own challenges as well as to address the evolving demands of their clients.

Greenwich Associates has identified four actions asset management firms should consider taking as they attempt to position themselves to succeed in this new business environment: Clearly define and articulate a differentiated value proposition; align offerings to meet evolving investor need; develop deeper advisory relationships; and market next-generation products.

Methodology:

Greenwich Associates conducts research with institutional investors on a global basis each year. We interview more than 3,000 key decision makers at the largest pension plans, endowments, foundations, and financial institutions to gather data on key market trends as well as feedback on the asset managers and investment consultants with whom they work. We use this data to advise clients on how to best position their businesses to succeed in this increasingly competitive environment.

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