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2015 European, Brazilian & U.S. Equity Investors - Latin American Equities

June 15, 2015
Executive Summary:

This report provides detailed information from European, Brazilian & U.S.-based investors investing in Latin American Equities, including helpful benchmark data such as:

- Annual cash equity commissions
- Commission allocation for research & advisory and sales trading services
- Commission allocation for specific research & advisory services
- Commission rates for single-stock agency trades by region

Graphic slides include:

- Projected Equity Commissions in Latin American Equities European Institutions
- Investment Approach for Latin American Market Portfolios European Institutions
- Portfolio Allocation for Specific Industries European Institutions
- Portfolio Allocation for Specific Countries-Regions European Institutions
- Proportion Latin American Commissions Allocated Specific Services – According PMs European Institutions
- Proportion Latin American Research-Advisory Allocation Specific Research European Institutions
- Number of Brokers Used for Latin American Research-Advisory Services European Institutions
- Projected Equity Commissions in Latin American Equities US Institutions
- Investment Approach for Latin American Market Portfolios US Institutions
- Portfolio Allocation for Specific Industries US Institutions
- Portfolio Allocation for Specific Countries-Regions US Institutions
- Proportion Latin American Commissions Allocated Specific Services – PMs US Insitutions
- Proportion of Latin American Research-Advisory Allocation Specific Research US Institutions
- Number of Brokers Used for Latin American Research-Advisory Services US Institutions
- Projected Equity Commissions in Latin American Equities Brazilian Institutions
- Investment Approach for Latin American Market Portfolios Brazilian Institions
- Portfolio Allocation for Specific Industries Brazilian Institutions
- Portfolio Allocation for Specific Countries-Regions Brazilian Institutions
- Proportion Latin American Commissions Allocated – PMs Brazilian Institutions
- Proportion Latin American Research-Advisory Allocation Specific Brazilian Institutions
- Number Brokers Used Latin American Research-Advisory Brazilian Institutions

Methodology:

Between November 2014 and May, 2015, Greenwich Associates interviewed 21 fund managers from European institutions, 28 fund managers from U.S. institutions and 13 fund managers from Brazilian institutions in Latin American shares. The data in this report is based upon aggregated results from individuals participating in the study.

Interview topics included trading and research activities and preferences, product and broker use, service provider evaluations, market trend analysis, and investor compensation.

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