Global Asset Management: Drivers of Success on Intermediary Fund Platforms

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Executive Summary:

For asset managers selling their products on intermediary platforms, the landscape is changing quickly.

Platform gatekeepers around the world are adopting more institutional—and more demanding—standards, and they are seeking firms with whom they can partner for broad, long-term relationships.

Meanwhile, challenging investment conditions and volatile markets are altering investor demand and shifting asset growth in the direction of innovative products, high alpha and portfolio-wide solutions.

Methodology:

Between July and September 2015, Greenwich Associates conducted 379 interviews with regional and local fund selection decision-makers and several interviews with global heads of fund selection at leading intermediary distributors. Interviews covered quantitative and qualitative evaluations of investment managers, objective assessments of those managers soliciting their business and detailed information on important market trends.

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