2018 Money In Motion with U.S. Institutional Investors

April 26, 2018
Executive Summary:

The annual analysis is based on reporting hiring expectations of influential institutional investors in the United States.

The results seek to address three dynamics:

1. Where institutional asset flows are going (in aggregate, by asset class, by product, active/passive)?
2. Who is driving institutional asset flows (by channel)?
3. Where are the largest revenue opportunities, and where will interest be the weakest?

Methodology:

Greenwich Associates' 46th annual research with U.S. Institutional Investors is based on in-depth interviews conducted primarily through in-person interviews, and supplemented by telephone interviews and online surveys, between July and October of 2017.

Respondents include 1,059 individuals from 884 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate and union funds, public funds, and endowment and foundation funds, with either pension or investment pool assets greater than $150 million.

- 460 interviews with corporate funds, including 318 interviews with funds with over $1 billion in combined defined benefit and defined contribution plan assets.
- 246 interviews with public funds, including 162 interviews with funds with over $1 billion in combined defined benefit and defined contribution plan assets.
- 188 interviews with endowments and foundations, including 54 interviews with institutions with over $1 billion in investment pool assets.
- 70 interviews with union funds
- 95 interviews with healthcare organizations.

Senior fund professionals were asked to provide quantitative and qualitative evaluations of their investment managers' investment and servicing capabilities and also of the managers soliciting their business. Fund professionals were also asked detailed information on important market trends.

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