

Trends in Investment Products: Active vs. Passive and Impact Investing

An IQ Database™ Timely Topic report – Coming July 2017

Overview

Hearts & Wallets Timely Topic reports cover new research from the IQ Database™ that hit on current industry themes, debates, and questions.

This report looks specifically at three popular types of investments and reveals the current attitudes that surround them. We surveyed consumers on a series of **attitudes surrounding active and passive investing** and **profiled targets based on their allocation** to active or passive. In addition, of the consumers who say that one of their goals is to **invest for a positive, social and/or environmental impact**, we show which types of impact investments they own and which they are likely to consider owning in the future.

What's Included?

- Active and passive investment attitudes
- Current allocation to active and passive funds
- Types of impact investments currently owned and/or considered
- Life Stages: Emerging, Early Career, Mid Career, Late Career, Pre/Post Retirees
- Wealth Group: <\$100K, \$100k-<\$500K, \$500K-<\$2M, \$2M+



How This Research Helps

- Learn how experienced investors are likely to believe that active management can add value, especially in market downturns.
- Stretch your thinking about different target markets for active/passive and blend.
- Impact investing has real appeal. Learn why and how consumers prioritize impact investing versus other goals.



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Note: Subject to change/additions

About the IQ Database™

The Hearts & Wallets Investor Quantitative Database™ is the most comprehensive resource for understanding and analyzing behaviors and attitudes of retail savers and investors. With over 1,000 fields and derived variables, the breadth and depth of topics covered is designed with decades of hands-on experience in the marketing, product, service and research functions it serves. It covers consumers of all age and wealth segments, with more than 5,000 annual responses to an online survey fielded mid-year since 2010. Consequently, its large sample size of 35,000 U.S. households permits sizing and profiling of virtually any demographic, behavioral or attitudinal definition for consumer groups. Its national weighting methodology allows for comparisons across years and customer/shareholder bases of leading firms.

About Hearts & Wallets

Hearts & Wallets is the resource for retail investor data and insights. Combining a consumer marketing framework with financial services operating experience, the company has a mission to be a catalyst for consumer-driven innovation in retail investing and saving. Hearts & Wallets data and insights are used by leading financial services firms to improve the effectiveness of their marketing communications, solution design and service delivery for retail investors.

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