

# Advisor Pulse Series

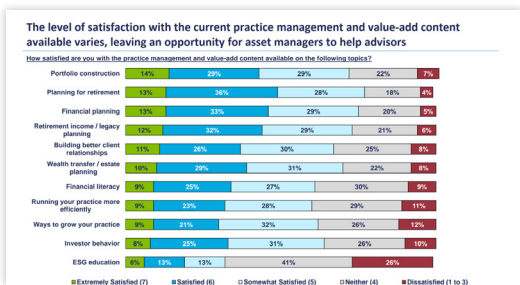
Get access to all twelve topical bi-monthly reports published throughout 2023 and 2024.

ISS MI's topical research reports provide unique and timely advisor perspectives on the intermediary-sold asset management landscape, through quantitative and qualitative interviews with advisors across the wirehouse, regional, independent, bank broker/dealer and RIA channels.

## Key Benefits

- Understand advisor perspectives on key market trends and industry topics
- Align strategies with advisors' product and distribution preferences
- Understand implications for gaining distribution shelf space
- Drive enhanced advisor engagement based on what advisors value most
- Deliver the right content, through the right channels, at the right frequency
- Effective targeting through advisor profiling
- Findings available within weeks of data collection to provide fresh and timely advisor perspectives

## 2023 Reports

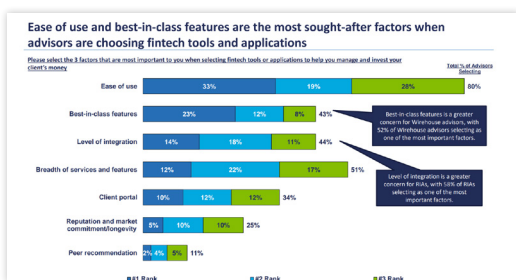
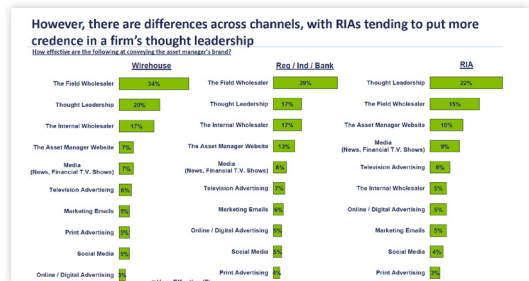


## PRACTICE MANAGEMENT AND ESG

In-depth review of topics relating to advisor practice management including perspectives that inform how asset managers can create, optimize and deliver value add content to advisors. Special section on advisors and ESG investments including usage and likelihood to recommend to clients.

## BRAND PERCEPTION AND PODCASTS

Advisor perspective on the importance and drivers of "brand" and their impact on asset managers' distribution effectiveness and advisor engagement. Special report sections provide added input on podcast content effectiveness and advisor contact preferences.



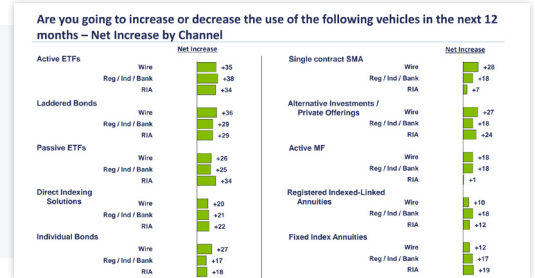
## FINTECH

Overview of advisors' use of fintech tools and applications, and ratings of most important fintech solutions. Includes rankings of top fintech solutions used and detailed input on platform features and capabilities.

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VEHICLES AND PORTFOLIO CONSTRUCTION

In-depth overview of trends in advisor portfolio construction including a behavioral overview on the use of specific products and vehicles, and asset manager selection processes, with a deep dive on direct indexing. Also includes an update on advisor contact preferences.

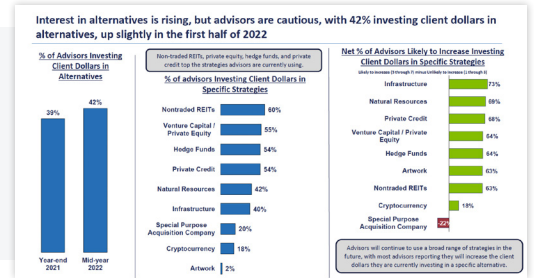


MARKETING, DIGITAL CONTENT AND SALES REPORT

Advisor perspectives to inform effectiveness of asset managers' marketing and investment content with specific focus on digital content, marketing channels and tools including websites, and field sales support. Special section on trends in cash/cash alternative allocations within client portfolios.

ADVISOR USE OF ALTERNATIVES

Advisor perspectives on the alternative investments landscape, and related trends, including perceptions of and use of various types of alternatives, recommendations within client portfolios and obstacles to usage.



2024 report topics will be determined closer to fielding timeframes in order to fielding the most relevant and timely data; planned themes typically include but are not limited to brand/marketing, optimizing content/digital channels, practice management, fintech, use of alternatives, portfolio construction, and other topical industry trends.

Methodology and Approach

ISS MI's Discovery Data advisor and intermediary database serves as the foundation for our advisor survey research. Each report integrates input from over 700 advisor surveys, supplemented by over two decades of historical data, trend analysis and deep industry expertise, to provide firms with actionable data-driven intelligence to optimize decision making and performance.

For more information, visit our landing page.

<https://page.issmarketintelligence.com/advisor-pulse-series>

About ISS Market Intelligence
ISS Market Intelligence empowers the global financial services industry to assess target markets, identify opportunities for growth, and execute comprehensive go-to-market initiatives to achieve success.
Our increasingly connected global platforms leverage a combination of proprietary data, powerful analytics, timely and relevant insights, in-depth research, and industry-leading media brands.
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