

Retail Investor Survey - Index strategies: 2023's untapped opportunity Summary



An LSEG Business

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The results of our inaugural wealth survey offer an abundance of good news for financial advisors, with U.S. retail investors looking to increase their investments in index strategies in 2023. For advisors, this appetite for indexes represents an overlooked business opportunity, which is especially valuable after a year of mutual fund outflows.

The findings also reveal surprising gaps in retail investors' understanding of index-based investing for those not investing, with the number one barrier being lack of knowledge.

Key highlights:

- 92% of investors are satisfied with their advisors, despite the turbulence in markets during 2022.
- Investors' confusion about indices and index funds present an untapped educational opportunity for advisors.
- Performance – not cost – is the main reason that investors' choose index-based strategies.