

How to effectively sell active equity products to model portfolio driven advisors in the US?



To effectively sell active equity products to model portfolio driven advisors in the US, consider the following strategies:

1. Understand the model



Meet our intelligent virtual analyst

Generative AI powered by 10 years of our expert research equips distribution teams with the intelligence to identify opportunities and make better decisions.

About DistributionAl

Our multifaceted approach

Expertise and global demand

Natural language generation

Interrogation of thousands of research documents

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2

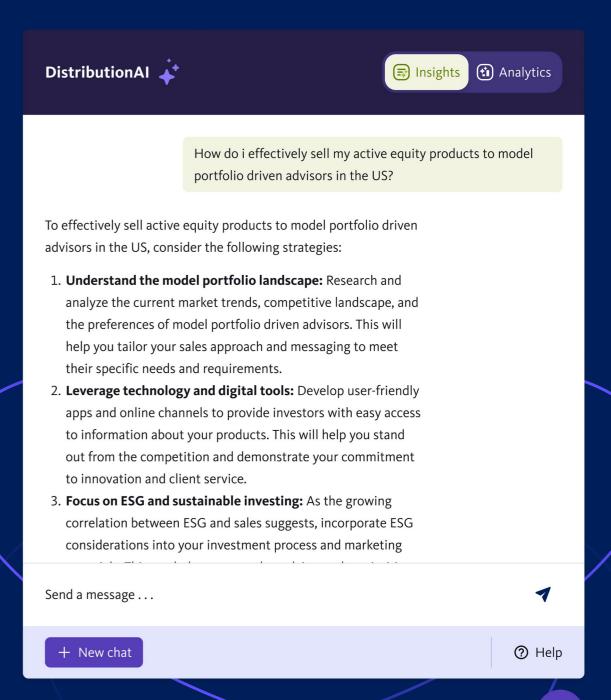
Broadridge

About DistributionAl

DistributionAl® is our intelligent virtual analyst. It augments our new predictive analytics capabilities, powered by the Global Demand Model, with 10 years of proprietary research and insights from our team of industry experts.

"Access to reliable expert insights from a source you trust. It's like having a dedicated insights team on hand 24/7."

Head of Distribution, Asset Manager



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Our multifaceted approach

Explore 10 years of our proprietary and detailed Insights reports, market research, and thought leadership and analyze global demand for asset management products.



Explore themes and trends impacting the global asset management industry. Trained on 10 years of proprietary research, hundreds of insights reports, and thought leadership written by our team of experts.





Precision analytics on current and future demand for global asset management products. AUM, flows, revenues available to members of the new Global Demand Model.

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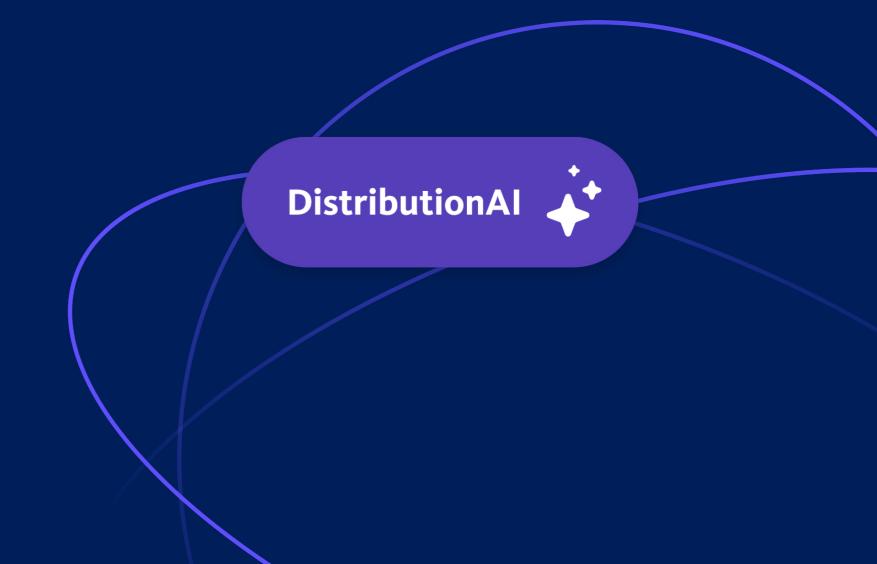
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4

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Expertise and global demand

Trained by our industry experts and built on our own unique data, DistributionAI is the culmination of 10 years of detailed research. Based on sophisticated predictive models and backed by US\$100 trillion of global demand.



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5

Broadridge DistributionAl®

Natural language generation

We engineered our AI with advanced natural language generation capabilities, leveraging cutting-edge algorithms, and extensive language model training to ensure fluent and contextually relevant communication.

Are active ETFs gaining popularity with US financial advisors, and why?



RIA (Registered Investment Advisor) distribution is different from broker-dealer and wirehouse distribution in several ways:

Asset Share: RIA distribution has a smaller asset share compared to broker-dealer and

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6

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CONTACT OUR TEAM FOR FURTHER INFORMATION

The DistributionAI team believe market intelligence sits at the heart of successful asset management businesses. We work with over 100 asset managers globally to help them evidence strategic decision making, respond effectively to changing market dynamics, and track their performance relative to the competition.

If you want to sharpen your competitive advantage, contact us at globaldemandmodel@broadridge.com to schedule a demo.

7