


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 portfolio

DistributionAI 

## 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.

# Chapters

About DistributionAI

Our multifaceted approach

Expertise and global demand

Natural language generation

Interrogation of thousands of research documents

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2

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DistributionAI®

# About DistributionAI

DistributionAI® 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

The screenshot shows the DistributionAI chat interface. At the top, there is a dark purple header with the 'DistributionAI' logo and two buttons: 'Insights' and 'Analytics'. Below the header, a user query is displayed in a light green box: "How do i effectively sell my active equity products to model portfolio driven advisors in the US?". The response is a white box containing the following text: "To effectively sell active equity products to model portfolio driven advisors in the US, consider the following strategies:" followed by a numbered list of three points: 1. **Understand the model portfolio landscape:** Research and analyze the current market trends, competitive landscape, and the preferences of model portfolio driven advisors. This will help you tailor your sales approach and messaging to meet their specific needs and requirements. 2. **Leverage technology and digital tools:** Develop user-friendly apps and online channels to provide investors with easy access to information about your products. This will help you stand out from the competition and demonstrate your commitment to innovation and client service. 3. **Focus on ESG and sustainable investing:** As the growing correlation between ESG and sales suggests, incorporate ESG considerations into your investment process and marketing. At the bottom of the chat window, there is a text input field with the placeholder "Send a message ...", a blue arrow icon, a "+ New chat" button, and a "Help" button with a question mark icon.



## Chapters

About DistributionAI

[Our multifaceted approach](#)

Expertise and global demand

Natural language generation

Interrogation of thousands  
of research documents

Get access

3

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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.



**Analytics**



**GLOBAL  
Demand Model**

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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## Chapters

About DistributionAI

Our multifaceted approach

Expertise and global demand

Natural language generation

Interrogation of thousands  
of research documents

Get access

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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## Chapters

About DistributionAI

Our multifaceted approach

Expertise and global demand

Natural language generation

Interrogation of thousands  
of research documents

Get access

5

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## 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

# Chapters

About DistributionAI

Our multifaceted approach

Expertise and global demand

Natural language generation

Interrogation of thousands of research documents

Get access

6

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# Interrogation of thousands of research documents

Our AI interrogates thousands of research documents within our 10-year accumulated database, extracting valuable insights with precision and efficiency.



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## Chapters

About DistributionAI

Our multifaceted approach

Expertise and global demand

Natural language generation

Interrogation of thousands  
of research documents

Get access

7

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## Get access through your Distribution Insight account

### 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](mailto:globaldemandmodel@broadridge.com) to schedule a demo.