Investment Trends

Our survey panel - the topics we cover

Who should participate

We welcome contributions from anyone involved in financial decision-making, including professional advisers, product providers, platform operators, fund managers, compliance and operations specialists, as well as investors of all experience levels.

Key topics we cover

✅ **Investment Behaviour & Market Sentiment -** Tracking how strategies shift with market conditions, economic outlook, and confidence levels, informed by insights from investors and advisers.

✅ **Portfolio Construction & Asset Allocation -** How advisers and portfolio managers structure, diversify, and adapt portfolios to meet objectives and manage risk.

✅ **Product Usage & Demand -** Identifying which investment, retirement, and advice solutions are gaining traction, and where new opportunities are emerging.

✅ **Technology & Innovation -** Exploring the tools, platforms, and digital solutions transforming advice delivery, investing, and client engagement.

✅ **Client Engagement & Service Delivery -** How advisers and super funds connect with clients, deliver value, and build lasting trust.

✅ **Retirement Planning & Financial Guidance -** Shifting needs and priorities for investors, advisers, and retirees, from early planning to post-retirement.

✅ **Regulatory & Operational Change -** How advisers and industry stakeholders adapt to compliance, policy changes, and evolving market structures.

✅ **Global Market Perspectives -** Comparing regional differences, shared challenges, and opportunities across major markets, reflecting investor and adviser experiences worldwide.

Get involved

Be part of the conversation. Share your perspective in our upcoming surveys and help shape the future of financial services.

WANT TO JOIN OUR SURVEY PANEL? - SIGN UP HERE