

# GLOBAL TRENDS IN FUNDS MARKETING AND COMMUNICATION



NEAR 70 000

MUTUAL FUNDS

DOMICILED GLOBALLY

2.4

BRANDS REMEMBERED SPONTANEOUSLY ON B2B  
MARKETS

20 MILLIONS

BRANDS INCLUDING WEB BRANDS

# A STRUCTURAL EVOLUTION OF THE MARKET

New actors, new regulations, new technologies: towards a disintermediated approach?



**ONE**

QUESTION...

**HOW TO EMERGE  
AND  
DIFFERENTIATE ?**

1. BUILDING BRAND TRUST
2. INNOVATIVE SERVICES
3. MASTERING CONTENTS

#1.

BRAND

TRUST IS

KEY

IF PRODUCT PERFORMANCE IS  
THE BETA OF AN ASSET  
MANAGEMENT COMPANY,  
BRAND IS ITS ALPHA.

Fund brand study 2013

[illegible]

# Erstklassige Renditen

## mit hochwertigen Unternehmensanleihen

Der Schroder ISF EURO Corporate Bond steht für:

- Aktives Management
- Einzigartiger Teamansatz
- Stabile Outperformance
- Best in class Information Ratio

= eine ausgezeichnete Wertentwicklung

1 Jahr	3 Jahre	5 Jahre
5,4 %	20,5 %	44,0 %

Haben Sie ihn auch schon auf der Liste?

[www.schroders.de](http://www.schroders.de)

Nur für professionelle Investoren



# Schroders

Schroder ISF steht für Schroder International Selection Fund. 1 Wertentwicklung der Anteilsklasse 1 nach Abzug der Gebühren auf Basis des Nettovermögens bzw. Rücklagenbasis. Quelle: Schroders, Stand: 30.04.2004. Renditen in Euro. Anlage des Fonds: 30.08.2000. Die Wertentwicklung in der Vergangenheit ist kein zwingender Hinweis auf den zukünftigen Wertverlauf, und der investierte Betrag kann den Rückkehrkursverlust übersteigen. Es wird auf das nicht ausschließende Risiko von Kurs- und Währungsschwankungen hingewiesen. Zeichnungen für Anteile des Fonds können nur auf der Grundlage des aktuellen Verkaufspreises und des letzten geprüften Jahresabschlusses sowie des darauf folgenden ungeprüften Halbjahresberichtes, sofern verfügbar, vorgenommen werden.

[illegible]



# GOING FURTHER... : BEING A MEANINGFUL BRAND

## Key Findings 2013

Meaningful Brands beat stock market by 120%



The Meaningful Brands Index outperforms the stock markets by 120% – an out-performance on par with the top hedge funds



The majority of people worldwide wouldn't care if 73% of brands disappeared tomorrow



Just 20% of brands worldwide are seen to meaningfully positively impact people's lives

# BUILDING TRUST: FIDELITY CASE STUDY



## Follow the green line

### Challenge

Spread the message that Fidelity offered the personalized guidance customers wanted in the midst of economic turmoil

Reassure consumers that Fidelity representatives are available 24/7

### Strategy

Turned Fidelity's iconic "Green Line" into an actual GPS to ease consumer concerns by giving directions and acting as their financial guide

### Results

We restored consumer confidence and Fidelity had the highest unsaided advertising awareness in the category

Unaided consideration and brand preference exceeded competitors by +10 points

Customer satisfaction increased 138%

Increased growth by 12%

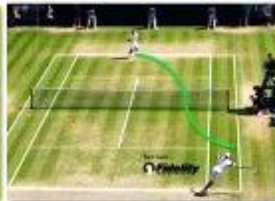
**TV:** Enhanced consumer understanding/enrichment of their favorite sports



**NFL**  
Dissected and diagrammed complex football plays into easy-to-understand game tactics



**PGA (golf)**  
Forecasted the slope of golfer's puts



**Tennis**  
Captured speed and direction of serves



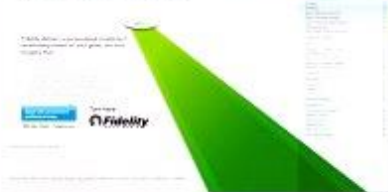
**MLB (baseball) Playoffs**  
Tracked pitches and hits



**Olympics**  
GPS in Olympic Hockey and resort guides across the US tying to the consumer's affinity for skiing

**Print:** In a series of first, the "Green Line" became a Table of Contents, a Museum Guide, Golf Caddy

Shorten the distance between you and your goals.



**Online:** Media-first custom skin on Golf.com

**DOH:** Travel guide across the nation stairways and escalators at busy airports; actual GPS calculators on golf carts nationwide



#2.

# DELIVERING SERVICE

INSTEAD OF PROMOTING ONLY PRODUCTS





Schroders put online a simple tool to explain its business cycle approach: this tool allows to assess where we are in the business cycle, which determines the level of risk wanted in the portfolio. That level of risk then changes as we move through the different phases of the business cycle.



# Capturing opportunities throughout the cycle

We aim to capture the best European opportunities by understanding the stocks most likely to outperform in each stage of the 'business cycle'.

[Business cycle approach](#)[Meet the manager](#)[Our funds](#)

## Business cycle approach

Our distinctive business cycle approach helps our fund managers identify the stocks that are most likely to outperform as the economy moves through each stage of the cycle; expansion, slowdown, recession and recovery.

Depending on the phase, the share price performance of different types of companies will react in different ways. By identifying the current stage of the business cycle, we aim to anticipate and capture rich investment opportunities.

III Navigate your way through each phase of the business cycle.



# Our funds

The three funds using this distinct approach are:

## Schroder ISF European Opportunities

The fund aims to outperform the benchmark, the MSCI Europe Net TR index, by >2% (net of fees) p.a. over the medium term.

Fund performance



Sales aid



Factsheet



KIID

## Schroder ISF European Equity (ex UK)

The fund aims to outperform the benchmark, the FTSE World Europe ex UK index, by >2% (net of fees) p.a. on a calendar year basis over the medium term.

Fund performance



Sales aid



Factsheet



KIID

## Schroder ISF European Equity Absolute Return

A long/short equity fund which aims to achieve absolute returns regardless of market conditions, with lower volatility and correlation to the FTSE World Europe index. It targets 10% p.a., net of fees.

Fund performance



Sales aid



Factsheet



KIID





CIBC imagined a new way to engage with financial advisors: by building a tool allowing them to create proposals on various types of investments with CIBC, detailing the client's investments, potential savings, and fund performances.

Since launching in Nov 2013 there has been a 45% net increase in sales.



[1 General Information](#)[2 Portfolio Information](#)[3 Review Portfolio\(s\)](#)

## Individual Portfolio Summary

Jack Jamison - Income Portfolio - Non-registered

Amount Invested:

**\$250,000**

Annual Account Fee:

**\$3,680**

**| 1.47%**

Potential Tax Savings:

**\$1,067**

Modify

### Portfolio Objective and Investor Suitability

## Portfolio Objective

Managed with a focus on regular income with modest capital growth expectations

## Investor Suitability

- Low tolerance for risk
- Recognize there will be fluctuations in the market value of the portfolio
- Medium to long-term investment time horizon

Strategic and  
Tactical Asset Mix

Asset, Geographic  
and Style Mix

Portfolio Breakdown

Generate Report

Consolidated Portfolio

Next Portfolio >

**1** General Information**2** Portfolio Information**3** Review Portfolio(s)

## Individual Portfolio Summary

Jack Jamison - Income Portfolio - Non-registered



Amount Invested:

**\$250,000**

Annual Account Fee:

**\$3,680****| 1.47%**

Potential Tax Savings:

**\$1,067**[Modify](#)Portfolio Objective and  
Investor SuitabilityStrategic and  
Tactical Asset MixAsset, Geographic  
and Style Mix

Portfolio Breakdown

Asset Mix



Geographic Region



Investment Style

[Generate Report](#)[Consolidated Portfolio](#)[Next Portfolio >](#)

1 General Information

2 Portfolio Information

3 Review Portfolio(s)

## Individual Portfolio Summary

Jack Jamison - Income Portfolio - Non-registered

X

Amount Invested:

\$250,000

Annual Account Fee:

\$3,680

| 1.47%

Potential Tax Savings:

\$1,067

Modify

Portfolio Objective and  
Investor SuitabilityStrategic and  
Tactical Asset MixAsset, Geographic  
and Style Mix

► Portfolio Breakdown

	Manager Weight	Investment Style	Allocation
<b>Imperial Short-Term Bond Pool</b>			40 % \$100,000
CIBC Global Asset Management Inc.	100 %	Fixed Income Core	
<b>Imperial Canadian Bond Pool</b>			32 % \$80,000
CIBC Global Asset Management Inc.	50 %	Fixed Income Core	
CIBC Global Asset Management Inc.	50 %	Fixed Income Index	

Generate Report

Consolidated Portfolio

Next Portfolio &gt;

#3.

CONTENT IS  
KING

# ADVERTISING : NEW TOOLS, NEW RULES

9%  
2000

0,11%  
2014

Average click rate for  
online banner ads

**144 millions** of people worldwide use adblocks , a raise of 70%  
between June 2013 and June 2014

**8''** Time dedicated to looking at an ad =

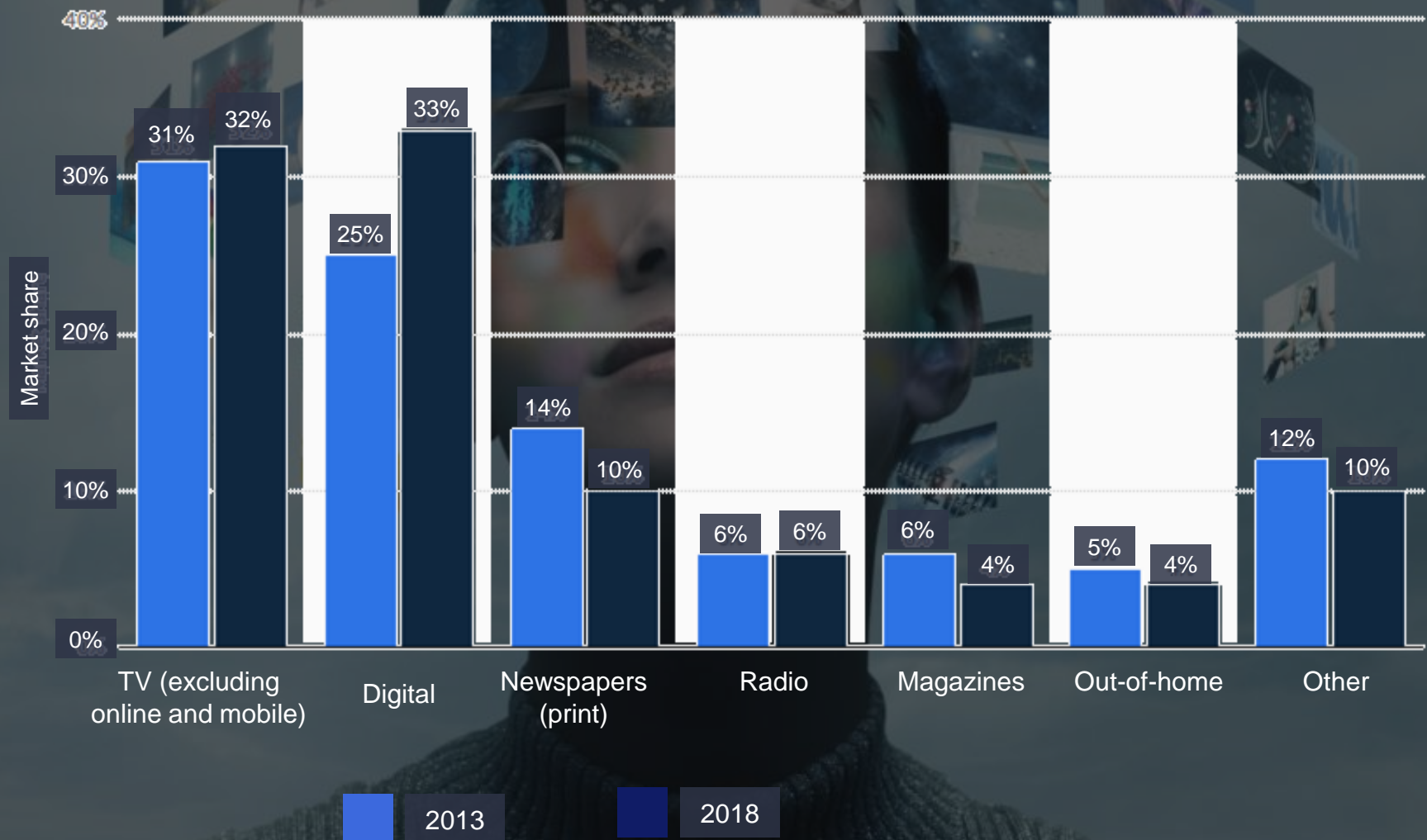
up to **25'** Time dedicated to read an article

**95%** time spent online is on content websites (Google 2013)



# ADVERTISING IN THE DIGITAL AGE

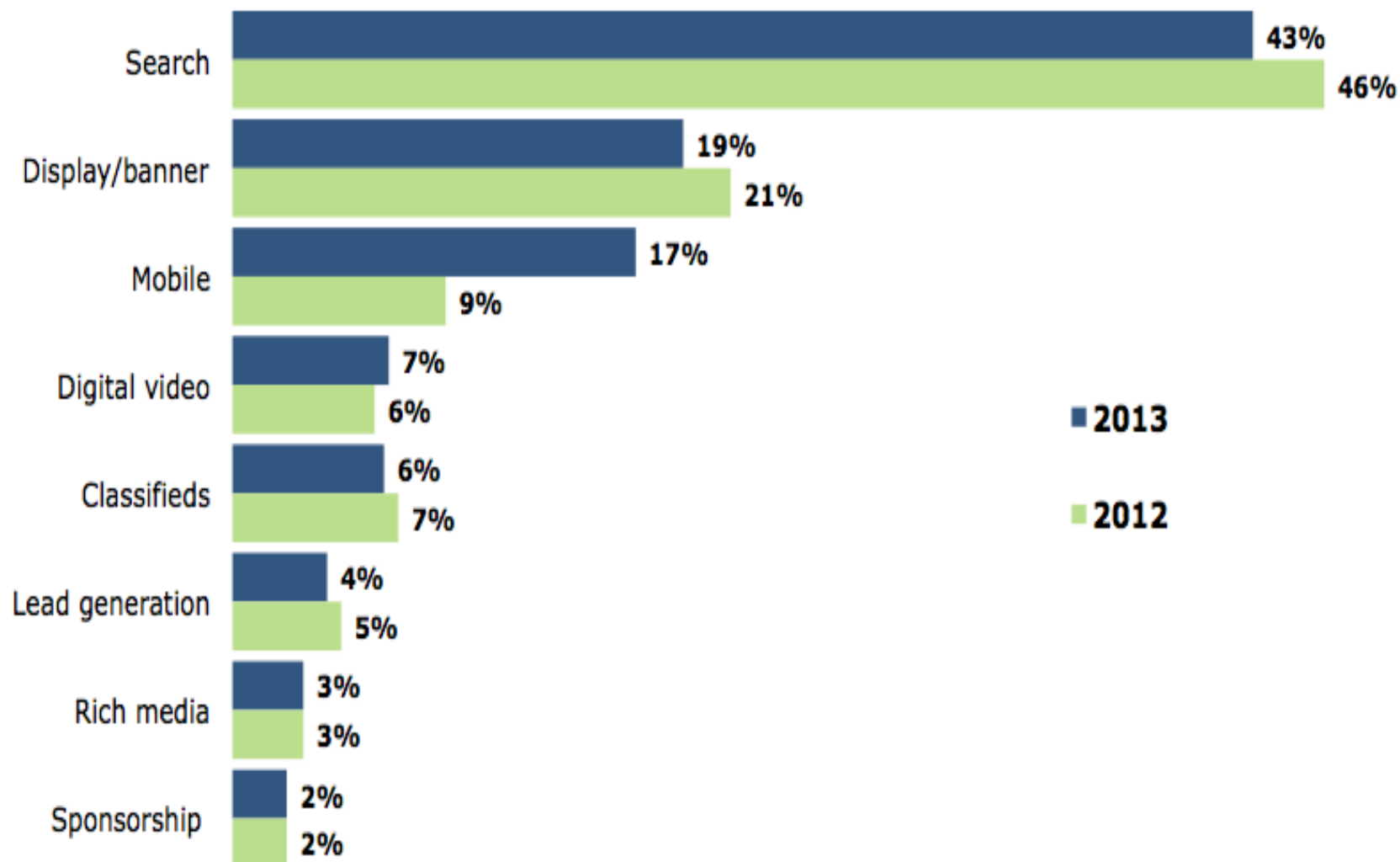
Distribution of advertising spending worldwide in 2013 and 2018 by medium



# Top Online Ad Formats, by Share of Revenues

% share, % change in spending

**2013 vs. 2012**



BY SHIFTING PARADIGM FROM  
ADVERTISING TO MARKETING CONTENT,  
**ASSET MANAGEMENT BRANDS**  
CAN ADDRESS THEIR TARGETED  
AUDIENCE MORE EFFICIENTLY.





PLACING THE  
STORY

TELLING THE  
STORY

REACHING  
OUT





**PLACING THE  
STORY**

**Creating  
new formats**

**REACHING  
OUT**





BlackRock has developed a comprehensive content strategy, addressing all target audience in every country, and creating content specifically designed for the internet.





## What investors are thinking

Our Investor Pulse survey sheds light on what investors are thinking and doing in the current investment environment.

[Email](#) [Print](#)

## Investor Pulse: Survey results for the UK

In the face of challenging global economic conditions and a new world of investing, we wanted to know what people in the UK were thinking about their financial futures. So, in partnership with independent research agency Cicero Group, we surveyed 2,000 people in the UK to understand what was on their minds.

### Investor Pulse findings

- > [Overview](#)
- > [1. Many UK citizens are concerned](#)
- > [2. A heavy reliance on cash](#)
- > [3. Knowledge gap around income investing](#)
- > [4. Inaction may affect retirement hopes](#)

YouTube FR

1 The Economy

2 Interest Rates

3 Inflation

4 Geopolitical Risk

5 Jobs

0:01 / 1:05

The BlackRock List: What to Know and Do for the Rest of 2014

BlackRock

iShares<sup>®</sup> by BLACKROCK<sup>®</sup>

THE Blog

BLACKROCK<sup>®</sup>

HOME ECONOMY INVESTING ETFS INSIGHTS MARKETS VIDEOS

Home / Economy / Insights / Investing / 5 Signs in the Fed Statement of a Sooner-Than-Expected Fed Rate Hike

BY RICK RIEDER FRIDAY 0

ECONOMY

SHARE

5 Signs in the Fed Statement of a Sooner-Than-Expected Fed Rate Hike

More importantly than whether the Fed's recent policy statement was "dovish" or "hawkish," the statement provided five signs that a Fed rate hike is likely to come earlier than many expect, writes Rick Rieder.

ABOUT THE CONTRIBUTOR

 RICK RIEDER  
Managing Director

Rick is BlackRock's Chief Investment Officer of Fundamental Fixed Income, Co-head of Americas Fixed Income and a member of the company's Global Operating Committee.

VIEW PROFILE

MORE FROM RICK





PLACING THE  
STORY

TELLING THE  
STORY

REACHING  
OUT





**Being where  
the audience  
is**

**TELLING THE  
STORY**

**REACHING  
OUT**





AXA addresses directly IFAs by creating a dedicated information space within the FT Advertiser: a space where content is provided both by AXA IM experts and FT Adviser journalists.







## Welcome to the AXA Distribution Hub

The global economy is less moribund than it has been at any time in the past few years. But in spite of a surge in optimism driven by a belated but surprisingly strong bounce back in the West, divergent trends across geographies and asset classes continue to make investment choices tricky.

Europe teeters on the brink of a pernicious deflationary spiral; US and UK equity markets look overheated after a two-year rally; emerging market sentiment remains brittle; prohibitive bond pricing persists; and even most property markets are apparently to be in the thrall of an asset bubble that could pop at any point.

Investors remain cautious and income-obsessed. On this special page you will find a wealth of information – some produced by us independently, the rest (hopefully) informative promotional material from our sponsor AXA IM – on the distribution funds which are designed to navigate just this terrain and target specifically these investors.

Has their time come? I will let you be the judge.

Ashley Wassall  
Editor, FTAdviser



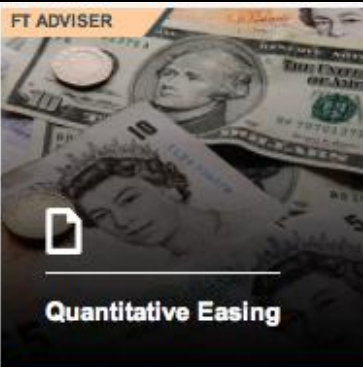
AXA IM



### Global Approach

The world is a far larger place than before, financially speaking.

FT ADVISER



### Quantitative Easing

AXA IM



### Distribution Funds

AXA IM



### Inflation

Inflation is a crucial issue for long-term investors.

FT ADVISER



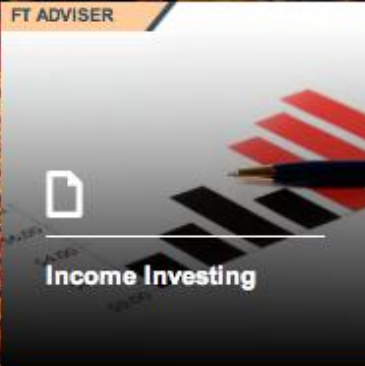
### Inflation, Deflation and Investor Risk Appetite

AXA IM



### Income Generation

FT ADVISER



### Income Investing

AXA IM



### Diversification

If all investment decisions were perfect, diversification would be redundant.

FT ADVISER



### Diversification

How much 'diversification' do you need in a portfolio?



### Fund Timeline

looking back over 35 years



### Distribution Fund Analysis

AXA IM



### AXA Distribution Fund

Meet the manager



### Opportunities

for cautious investors





PLACING THE  
STORY

TELLING THE  
STORY

REACHING  
OUT





PLACING THE  
STORY

TELLING THE  
STORY

Talking through  
targeted  
channels





## Eric Chaney

@AXAChiefEcon

Breaking views, Economic & Financial insights on global markets by the Chief Economist of AXA -the global insurer- & Head of Research of AXA Investment Managers

Paris, France

[axa-im.com/en/research](http://axa-im.com/en/research)

TWEETS  
19

PHOTOS/VIDÉOS  
9

ABONNEMENTS  
28

ABONNÉS  
238

Plus ▾

+ Suivre

Tweets

Tweets et réponses



Eric Chaney @AXAChiefEcon · 21 h

**#Germany:** Firms Go on U.S. Buying Spree (@WSJeuropa). Now we know where the C/A surplus goes. What about the Dutch?



@AXA

@AXAIM

@AXAResearchFund

[www.axa.com/en/disclaimer/twitter](http://www.axa.com/en/disclaimer/twitter)  
[www.axa.com/fr/avertissement/twitter](http://www.axa.com/fr/avertissement/twitter)

redefining / standards



Ne manquez aucun Tweet de **Eric Chaney**

Nom complet

Adresse email

Mot de passe

S'inscrire sur Twitter



Cisco

810,957 followers

Follow



Home

Careers

*TOMORROW starts here.*

How will the **#InternetofEverything** change the way your business works?

Call us. 866-432-1783.



### How You're Connected



**62** second-degree connections  
**76,230** Employees on LinkedIn

[See all](#)

### Careers



#### Interested in Cisco?

Learn about our company and culture.

747 jobs posted

[Learn more](#)

### Cisco Showcase Pages



Cisco

Computer Networking  
10,001+ employees



Cisco Data Center and...

13,233 followers  
[+ Follow](#)



Cisco Security

10,016 followers  
[+ Follow](#)

Cisco Enterprise

Cisco (NASDAQ: CSCO) enables people to make powerful connections-whether in business, education, philanthropy, or creativity. Cisco hardware, software, and service offerings are used to create the... [see more](#)

### Recent Updates

**Cisco** Cisco is creating the world's largest global Intercloud – a worldwide network of interconnected clouds and cloud service providers. Yesterday we accelerated our strategy with the acquisition of private OpenStack cloud service company Metacloud: ... [more](#)



#### Join the winning cloud team at Cisco

cs.co · We're building the best team in the business so we can continue to change the way the world works, lives, plays and learns by connecting the unconnected.

Like (128) · Comment (1) · Share · 4 days ago

Anderson Schinemann, Volkan Çelebi +126

Astrologer RAMESH GURU interesting  
4 days ago

Add a comment...





Cisco Security

10,016 followers

Follow

Intelligent cybersecurity for the real world. Cisco provides unmatched visibility, continuous control & advanced threat protection across the entire attack continuum-before, during, & after an attack.

#### Industry

Information Technology and Services

#### Followers



See more

**Cisco Security** Why Is Enabling Only Authorized Users So Complex?  
<http://cs.co/6045oa6D>



#### Why Is Enabling Only Authorized Users So Complex?

cs.co · In the past, a critical component of preventing threats was understanding and controlling network access and access to network

**Cisco Security** Discover how Cisco TrustSec technology can help make PCI DSS compliance easier and faster. Register now for our live webcast on Sept 24: <http://cs.co/6045om2N>



#### Making PCI Compliance Easier with Cisco TrustSec

cs.co · Learn how Cisco TrustSec can help make PCI DSS compliance much easier and faster by reducing the

THANK YOU

W BRAND  
CONSULTING™