

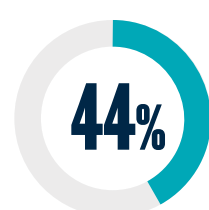
Wealth Trends in Alternatives: OPTIMIZING OPPORTUNITIES



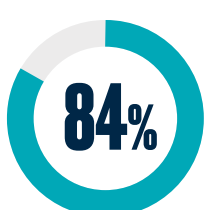
A new era of private wealth as the source of capital for alternative investments

The use of alternative investments (alts) in client portfolios is one of the fastest-growing trends in wealth management. To help gain insights into current and future use of alts and understand the needs of wealth managers and their clients, BNY Pershing surveyed more than 100 wealth managers in the United States for their perspective.

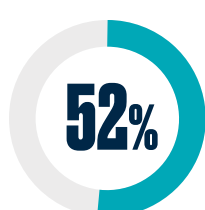
Alts are gaining traction



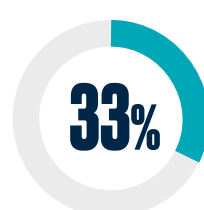
of wealth managers have **greater than 20%** of their portfolios allocated to alts



of wealth managers expect **alts allocations to rise** in the next 12 months



of wealth managers expect alts allocations to be **significantly higher** in the next 12 months

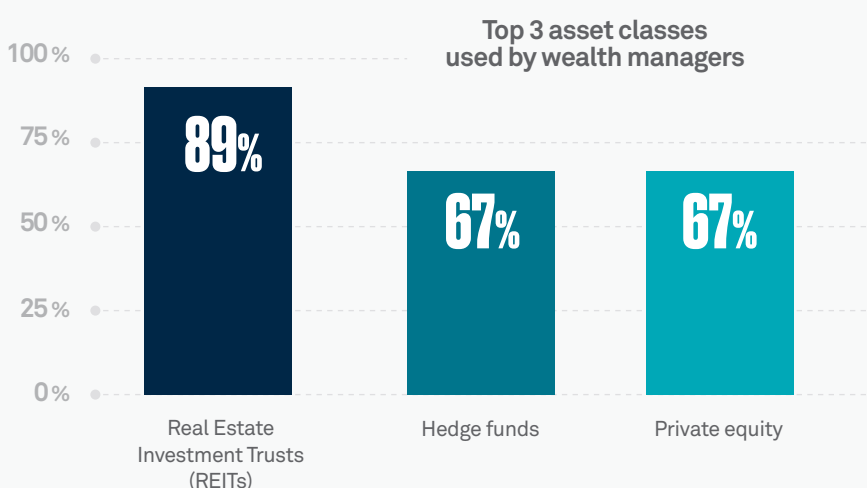


of wealth managers are not currently using alts but are **likely to start** in the next year

REITs are riding high

89%

of wealth managers are using alts to generate **longer-term returns**



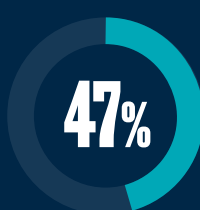
Hedge Funds a top choice for alts allocation among wealth managers



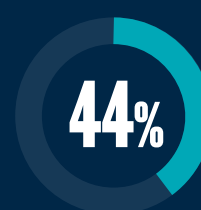
use alts for **current income**



list **liquidity** as one of the most important factors when selecting alts

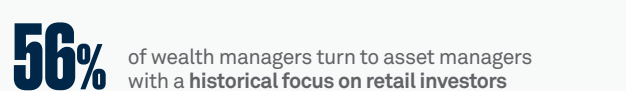
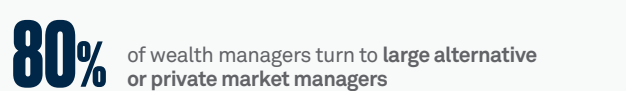
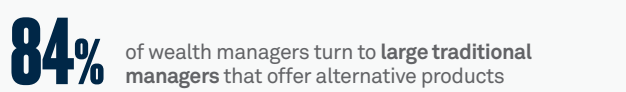


use **evergreen hedge funds** to access alts



expect their allocation to hedge funds to be **significantly higher** in the next year

Big brands matter when selecting alts



Straightforward strategies are essential



Having a robust selection of alts managers to choose from is the **biggest challenge** for wealth managers

44% 🔍

of wealth managers agree that it is **harder to research alts products** than traditional investments

>75% ⌚

of wealth managers spend **6 hours or less** screening for, researching, or learning about alts products

TO LEARN MORE

contact CapIntro@bny.com

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