

ASSET ALLOCATION TECHNOLOGY SURVEY

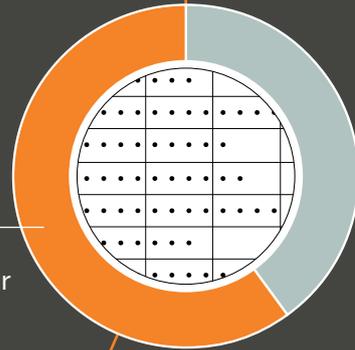
FINDINGS AND CONCLUSIONS



Milestone Group surveyed asset owners and investment managers globally. Here are a few representative findings.

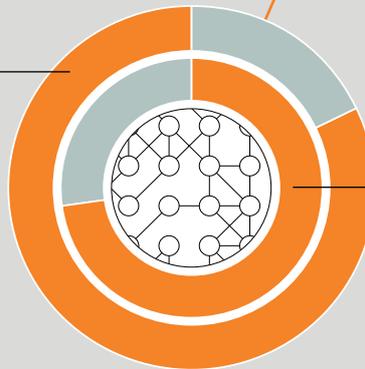
USAGE OF SPREADSHEETS IS RAMPANT

60% of asset allocators rely on **spreadsheets** in their investment processes



COMPLEXITY CONTINUES TO RISE

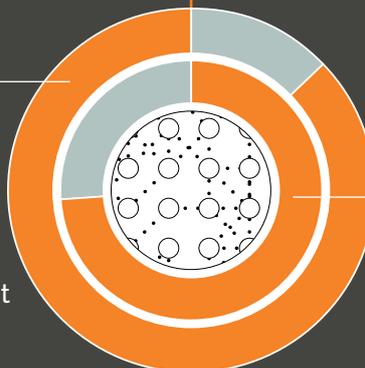
82% of asset allocators report that investment strategies are becoming **"more"** or **"much more"** complex



73% of asset allocators believe that portfolio implementation is becoming **"more"** or **"much more"** complex

TECHNOLOGY IS IMPORTANT BUT ITS IMPLEMENTATION IS FRAGMENTED

87% of asset allocators declared that technology is **"critically"** or **"very important"** when implementing advanced investment strategies



74% of asset allocators require **better technology** to manage and rebalance their portfolios

For the full survey report visit milestonegroup.com/AATSurveyReport