

March 2019

Financial Bundling and Product Switching in Banking - Canada

“Boosting multiple product ownership is a double powered engine for financial institutions as it increases profitability through wallet share and also builds loyalty by discouraging attrition.”

– Sanjay Sharma, Senior Financial Services Analyst

January 2019

Attitudes towards Financial Advice - Canada

“In times of market turbulence, client communication becomes even more important for financial advisors as jittery clients seek reassurance and advice.”