

November 2013

Affluent Investing - UK

“Three quarters of affluent consumers are saving for their retirement, which is a much higher proportion than across the wider population. For wealth management firms, promoting SIPPPs and other pension products should be an important strategy in a bid to capitalise on the demand for retirement savings – and thus ...

Savings and Investing - Intermediary Focus - UK

“Financial advisers are burdened by increased costs due to the RDR, however, they are yet to embrace the power of online tools to engage with larger numbers of consumers and make efficiency savings.”

October 2013

Share Dealing - UK

“A lack of financial education has caused many consumers to lack the confidence to make financial decisions. Many see shares as high-risk financial products that are beyond their understanding. With interest rates expected to remain low for the foreseeable future, these consumers are losing money due to the impact of ...

September 2013

ISAs - UK

“There is huge potential to increase the take-up of ISAs, given that many more people hold cash and investments than hold one of these tax wrappers. A low central base rate should encourage more savers to look favourably upon cash ISAs, which tend to offer better returns than their non-tax-exempt ...

August 2013

Consumers and Direct Platforms - UK

“Direct DIY platforms are popular amongst consumers who have an interest in finance and confidence in making financial decisions. For less confident consumers direct discretionary platforms could solve their investment needs.”

July 2013

Collective Investments - UK

“A large number of UK retail investors are simply unprepared to put their money at risk by investing in equities. Given that a larger number of people save for emergencies and unexpected events, rather than to generate an income, most adults will always be wary of using products outside the ...

February 2013

Saving and Investing for Children - UK

“Even during a period when the Bank of England base rate is at a historical low, only 4% of parental savers show an increased interest in non-traditional products, such as equity-based investments. These attitudes are reflected on a wider level among British investors, with very few adults actually confident to ...

Upcoming Reports

Buy to Let - Investing in Property - UK - March 2013