

Investment Trends - US - February 2016

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The economy is strengthening, the stock market has been volatile, and interest rates remain low. The recession hit portfolios hard, and many people adjusted their investing behavior, with some becoming more aggressive and others more conservative.

This report looks at the following areas:

- Do they have investment account(s) and, if so, what kind?
- How much do they have invested in taxable and tax-advantaged retirement accounts?
- What are their investment plans for the next 12 months?
- How do they feel about robo-advisers?
- How do they plan to adjust their investment strategies to fit their vision of the US economy?

Different generations have different investment goals and allocate their investment portfolios accordingly. This report will examine how investors view investing whether – and how – they have changed their investment goals.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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