

# Investment Trends - US - 2023

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## This report looks at the following areas:

- Investment product ownership
- Reasons for investing
- Channels used for investing advice
- Most important factors in choosing an investment platform
- Attitudes towards investing

Unlike traditional investors who view investing as a long-term pursuit, younger first-time investors (i.e. consumers with less than one year of investing experience) are more focused on the short-term gains associated with investing (see Consumer Trends). This is reflected in their current holdings, which tend to be riskier and include the alternative assets such as crypto and NFTs, compared to the more conservative and lower-risk investments favoured by seasoned investors (i.e. consumers with over five years of investing experience) such as bonds and mutual funds (see Investment Product Ownership). Additionally, retirement is still not a priority for first-time investors, with only 36% citing it as their reason for investing, compared to nearly 80% of seasoned investors (see Consumer Trends).

After a challenging 2022, rife with inflationary pressures, geopolitical unrest, as well as market volatility, it will be interesting to monitor if first-time investors' begin to evolve their holdings as a diversification hedge against economic headwinds – potentially seeking more international exposure through ETFs or perhaps other alternative investments such as commodities. While 2023 has brought with it numerous economic improvements, there still is an air of uncertainty remains – as far as whether the country will be able to skirt a downturn. As such, most investors remain keen on decreasing their risk tolerance, as seen with the nearly 70% who said they are more interested in low-risk investments (eg treasury bills, certificates of deposit) due to the uncertain economic climate. While tough to predict what the rest of this year holds for investors, brands must continue leveraging their most effective



“While the macroeconomic challenges of 2022 have quelled investor confidence, the US has continued to make strides and seen considerable improvements across various areas of its economy. Should these improvements be sustained, investor confidence could be reignited alongside an influx of younger, first-time investors more assured coming into the market.”

**- Amr Hamdi, Senior Finance Analyst**

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channels, such as financial advisors and social media, to remain in-tune and engaged with their customers' needs and concerns.



### What's included

Executive Summary

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