

# MODEL BEHAVIOUR

A guide to model portfolio activity in the UK



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Funds in model portfolios account for c 40% of the retail advised platform market (£460 bn as at Sept 2020), so if your funds aren't included in model portfolios, then you're potentially missing out on a substantial stream of business.

Discretionary fund managers used to be the main providers of model portfolios, but now platforms, fund managers, research houses, and even advice firms are getting in on the action. How do you get your funds on their radars? Does one size fit all or do you need to tailor your approach? How do you do business in this increasingly competitive world? What do model providers want from fund managers?

**Model Behaviour** gives you the answers to these questions and many more, along with the lowdown on all things model portfolio in the UK investment industry. High on quant, full of qualitative colour and enriched with adviser, platform and fund manager insights, the report includes:

- **Distribution trends**
- **Fund selector influence**
- **The size of the model portfolio market**
- **Types of model portfolios**
- **Pros and cons of model portfolios**
- **Model portfolio providers – advisers, platforms, fund managers, research houses and their relative chances of success.**
- **What advisers want from model portfolios**
- **What model portfolio providers want from fund managers**
- **Growth forecasts**
- **In-depth interviews**
- **And more!**

**Price: £4,500**

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### About Fundscape

Established in October 2010, Fundscape is a research house specialising in the end-to-end research and analysis of the UK fund industry. It is the publisher of the quarterly Fundscape Platform Report, widely regarded as the industry benchmark for platform data and statistics in the UK. With over 50 years' experience between them, the team is well placed to provide unique insight into asset management and distribution trends, including product development, distribution and marketing.



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