

Press Release

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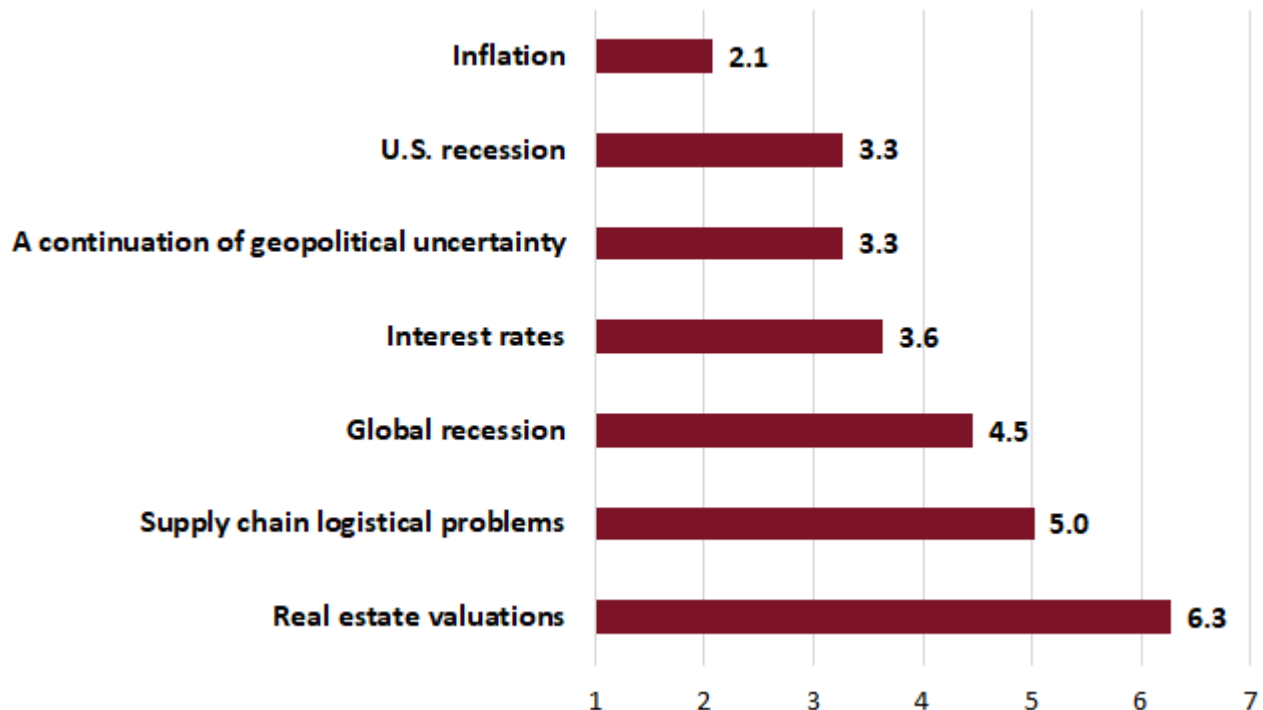
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Inflation Remains Top of Mind Among Advisors' Concerns

April 19, 2023, Needham, MA –With inflation hovering around 6%, the issue is reported to be the biggest economic concern for Americans. Based on recently released findings from FUSE Research Network's Advisor Trend Monitor Series Report – *Advisor Top Trends for 2023*, surveyed advisors for the second consecutive year ranked inflation as their chief economic concern.

Advisor Economic Concerns



Note: Scale of 1 to 7, with 1 being "Top Concern"

Source: FUSE Research Network

Unease about a U.S. recession and continued geopolitical uncertainty, namely the Russia-Ukraine war, tied for second on the list of issues weighing heavily on advisors. Interest rates fell to the middle of advisor concerns even though the March 22, 2023, Federal Reserve hike set interest rates at their highest level in 15 years. Despite the pandemic dislodging the global supply chain and home prices

increasing at a significantly greater pace than inflation since 2020, these areas were deemed least worrisome.

“For a prolonged period, advisors have been dealing with multiple challenges that present asset managers with opportunities to provide solutions and needed support,” said Mike Evans, Director of BenchMark Research at FUSE Research. “Appetite among advisors for investment and economic commentary is elevated today compared to the pre-pandemic period when rising markets and low inflation and interest rates didn’t require advisors to continually monitor the environment. We strongly recommend firms actively work with their advisor and home office partners to produce thought leadership content addressing the impact and best response to economic and geopolitical issues.”

Evans continued, “Since advisors are likely modifying client assets to counter inflation, portfolio construction resources are in demand. Sales teams should be proactively identifying advisors looking for support for their client portfolios and offering their portfolio construction services.”

In addition to economic concerns, the Advisor Trend Monitor Report – *Advisor Top Trends for 2023* examines a number of issues including advisor product, vehicle, asset class, and solution usage; preferred form and delivery of marketing content; and impact of technology solutions on an advisor managing their business. The research is based on a survey of nearly 400 financial advisors across all channels. Overall data survey findings are presented by various advisor demographics.

The FUSE Advisor Trend Monitor is a survey-based report series that provides timely insight into advisor views on a range of issues central to asset managers’ decisions about resource allocation.

For details about obtaining a copy of Advisor Trend Monitor – *Advisor Top Trends for 2023*, please email Jason Heinhorst at jheinhorst@fuse-research.com or call (720) 221-5223.

[About FUSE Research Network LLC](#)

FUSE was launched in 2008 with the view that research and consulting support for asset managers has failed to evolve with the changing needs of the client. The future competitive environment will demand that clients make important business decisions within shorter and shorter timeframes.

To support clients in this setting, FUSE provides a dynamic research platform that covers our clients’ current and future decision areas (strategic and tactical). Our goal is to become an invaluable business partner through the delivery of highly informed and forward-looking recommendations that are among the critical inputs our clients need to optimize results.

