

Cap IntroGraphics

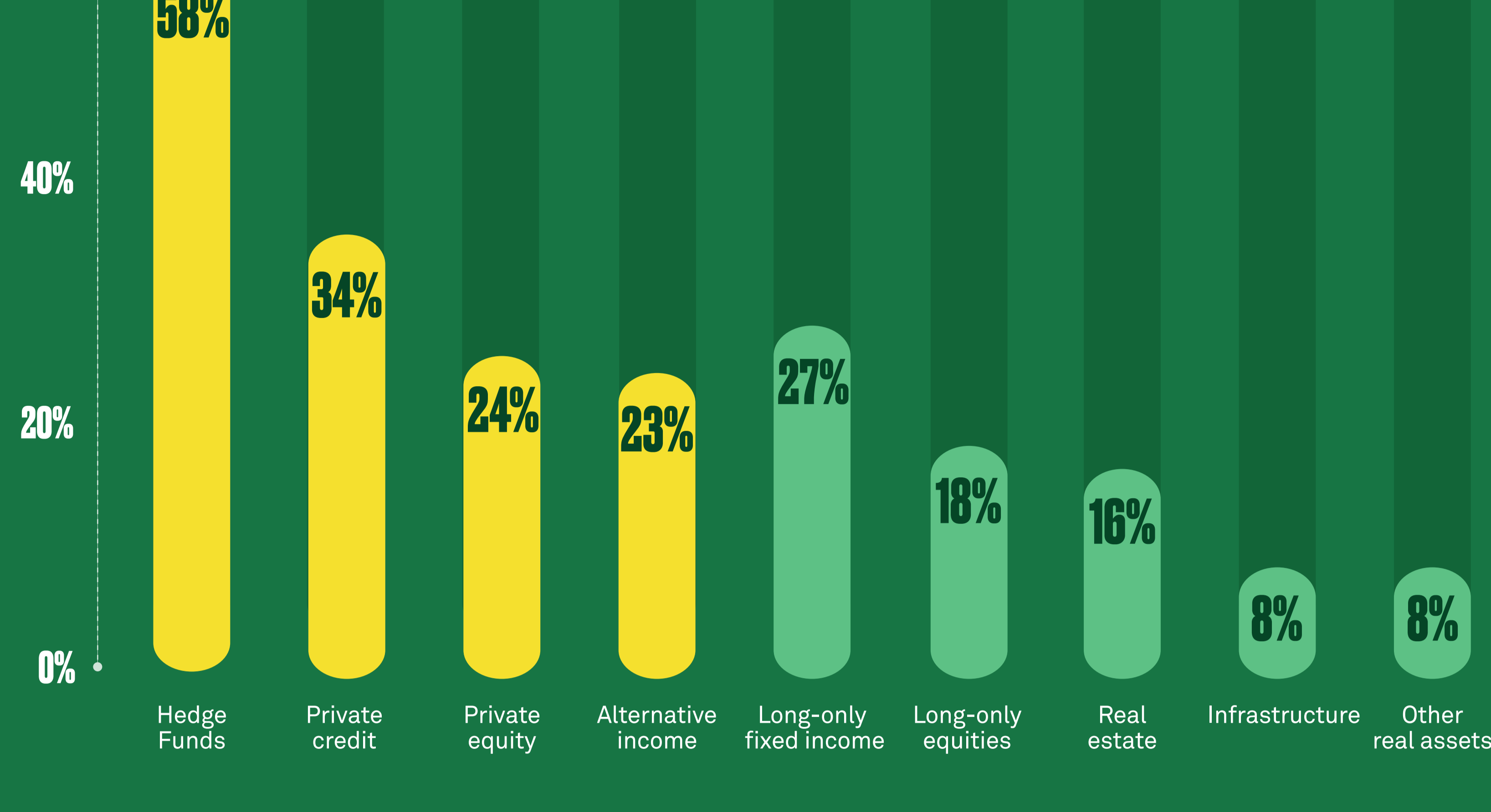
MONEY IN MOTION

Pershing's Capital Introductions team meets with private wealth and institutional investors to gain insights on investments in the current marketplace. The team recently surveyed more than 60 investors to understand money in motion, such as changes they may be considering to their asset allocations and hedge fund portfolios in 2024. The latest edition of Cap IntroGraphics illustrates the survey findings.

ASSET CLASSES

Alternative categories are a top consideration for inflows...

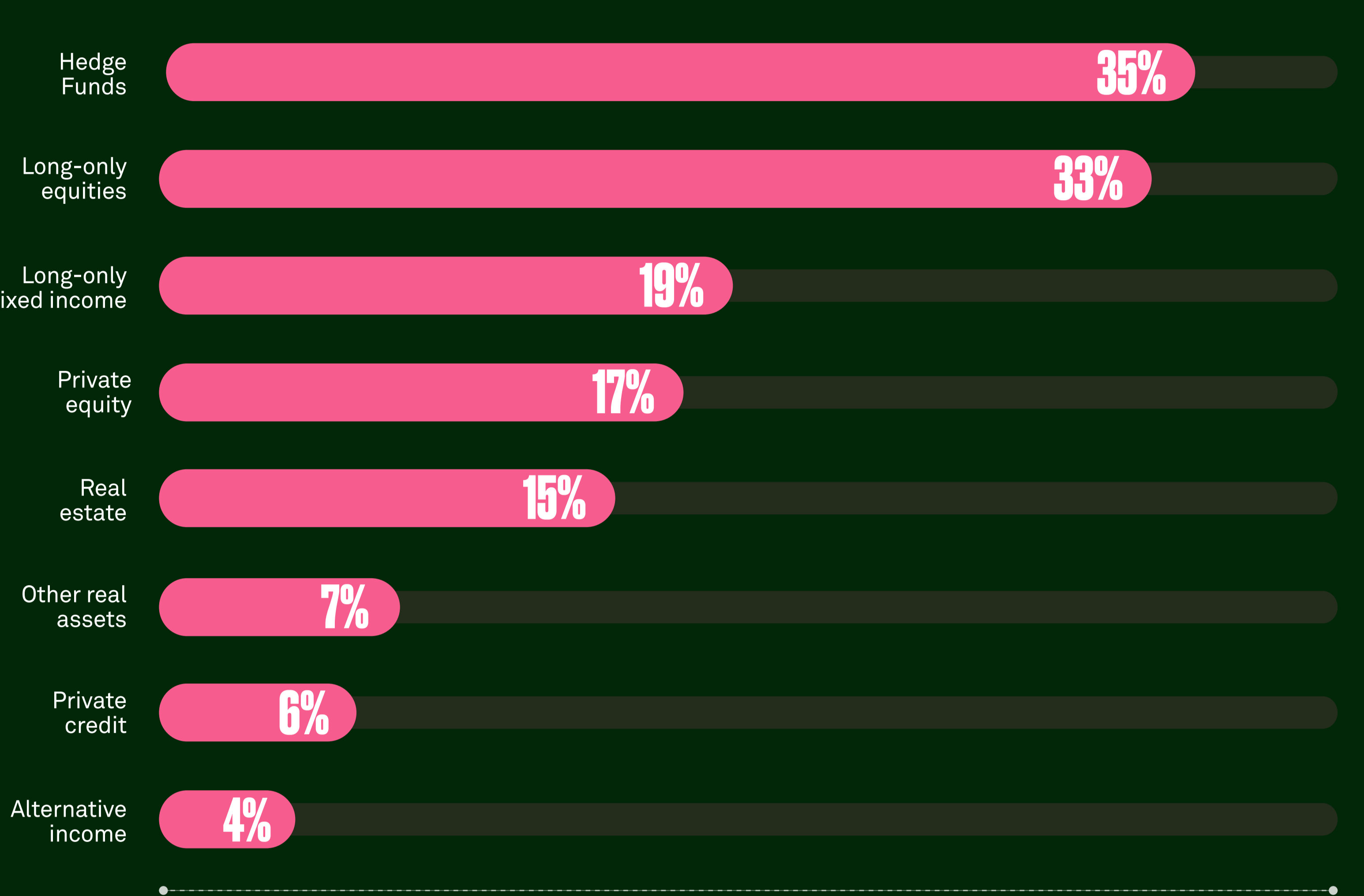
Which asset classes are investors considering increasing?



13% of participants do not anticipate making any changes

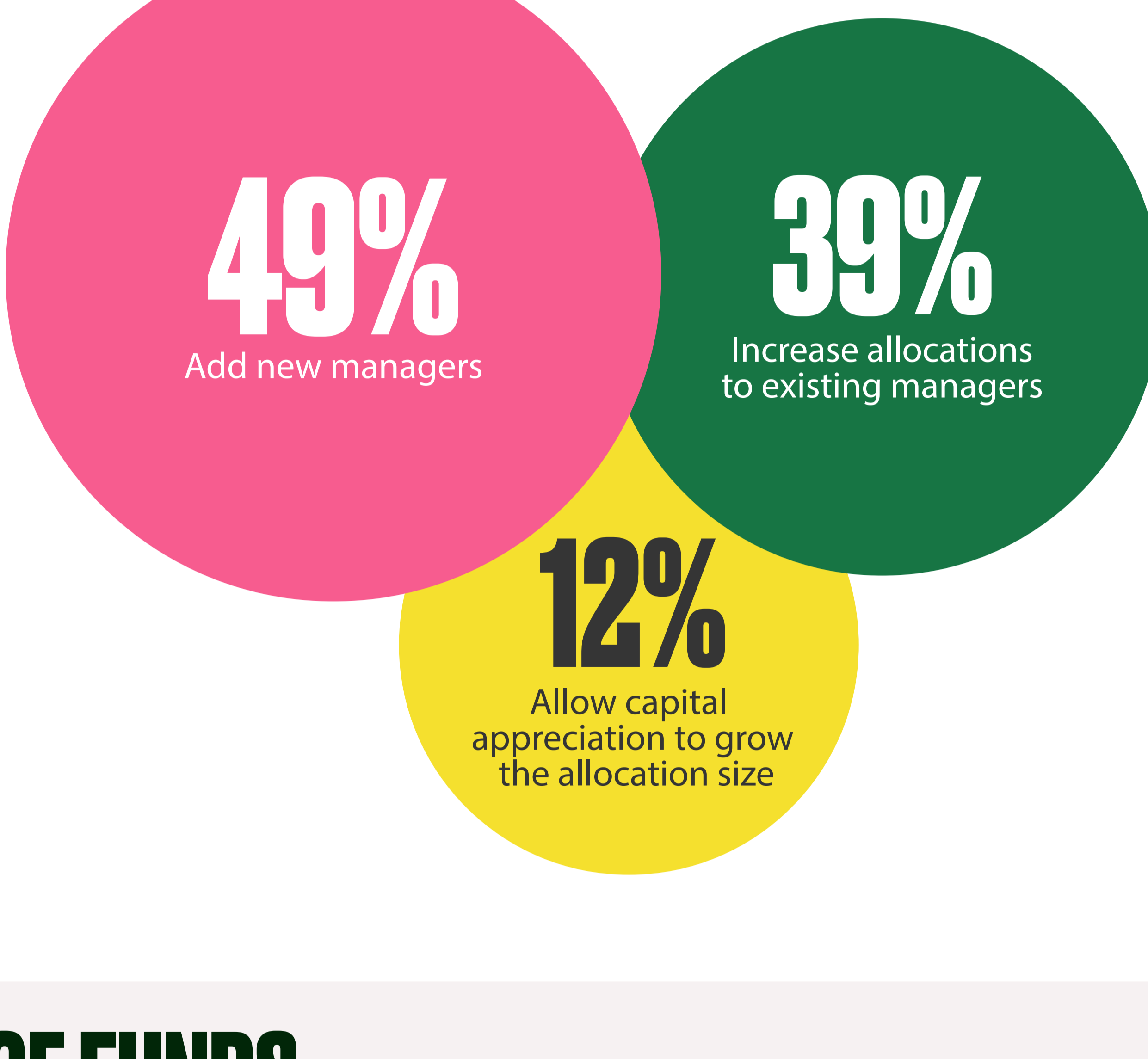
...while public market strategies are a top consideration for outflows.

Which asset classes are investors considering decreasing?



Investors are looking to add new managers in 2024

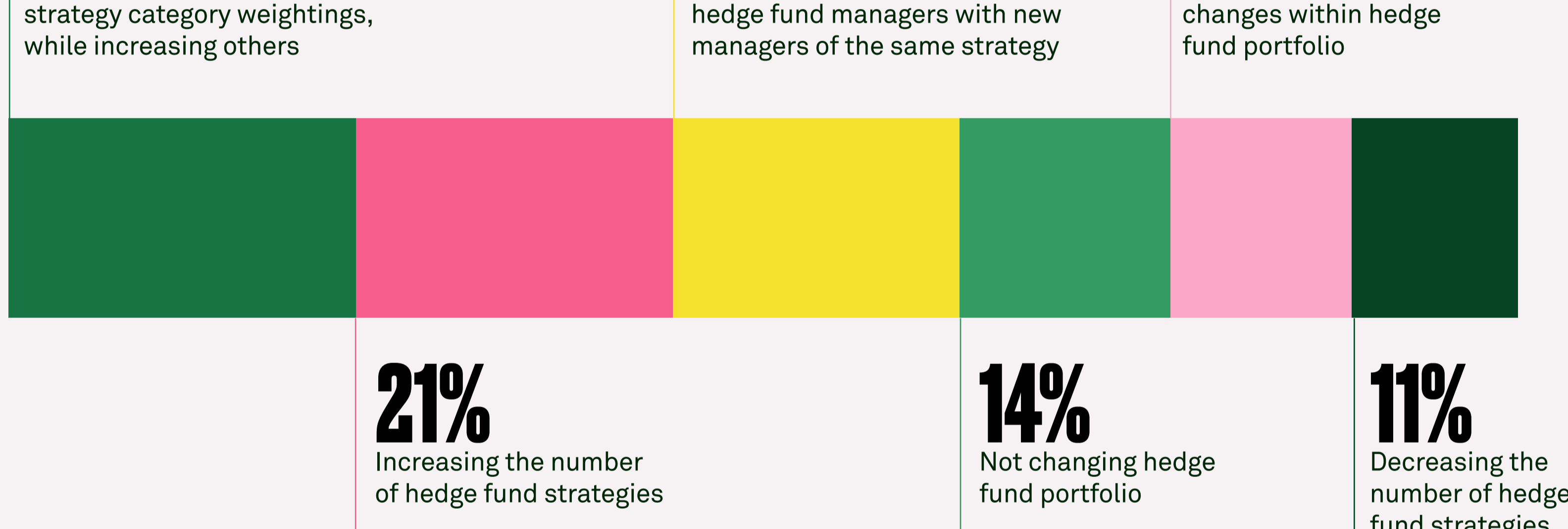
What is the primary way investors will implement asset class increases?



HEDGE FUNDS

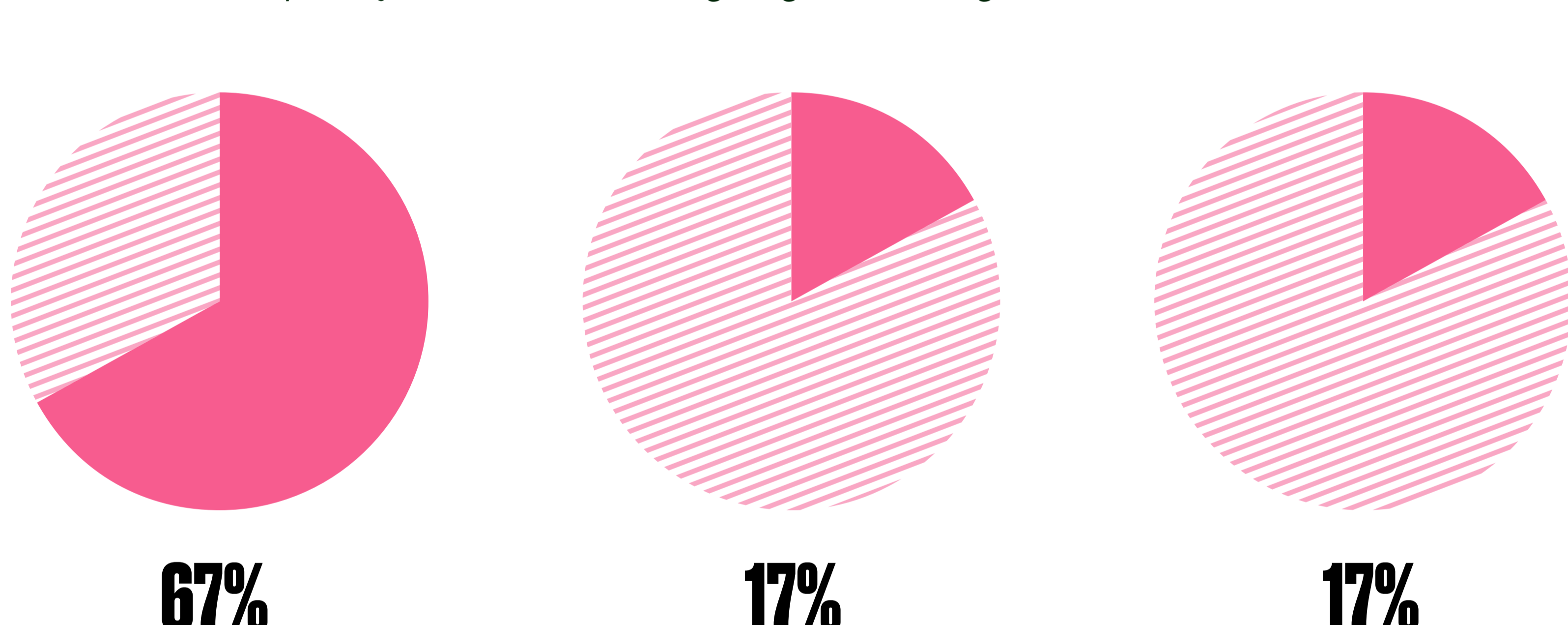
Change is in the air

There are a variety of changes investors are considering within their hedge fund portfolios, from performance-related measures to increasing the number of managers.



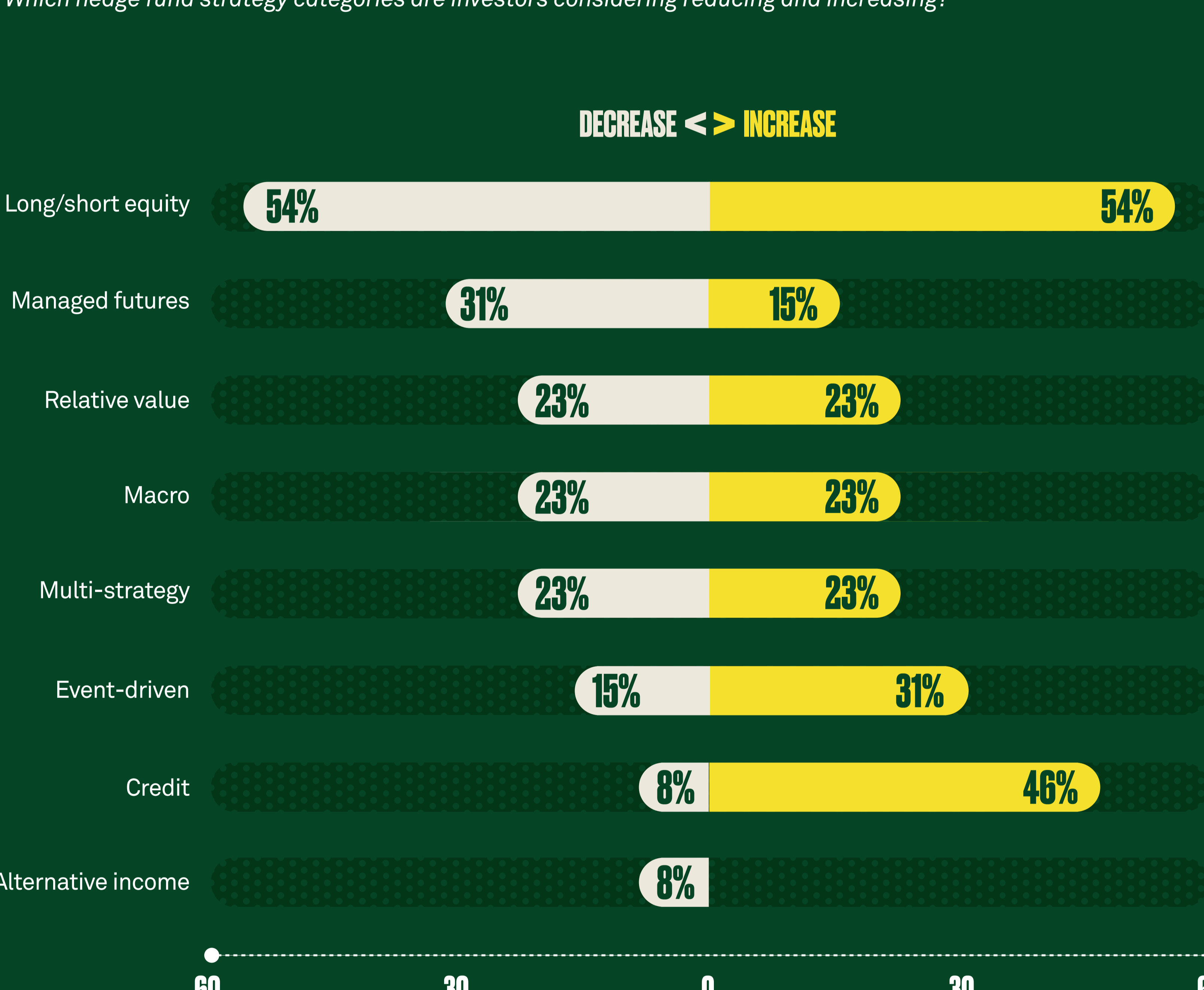
Adding new managers is the top way investors are growing their portfolios

What are investors' primary methods for increasing hedge fund strategies?



Inflows and outflows

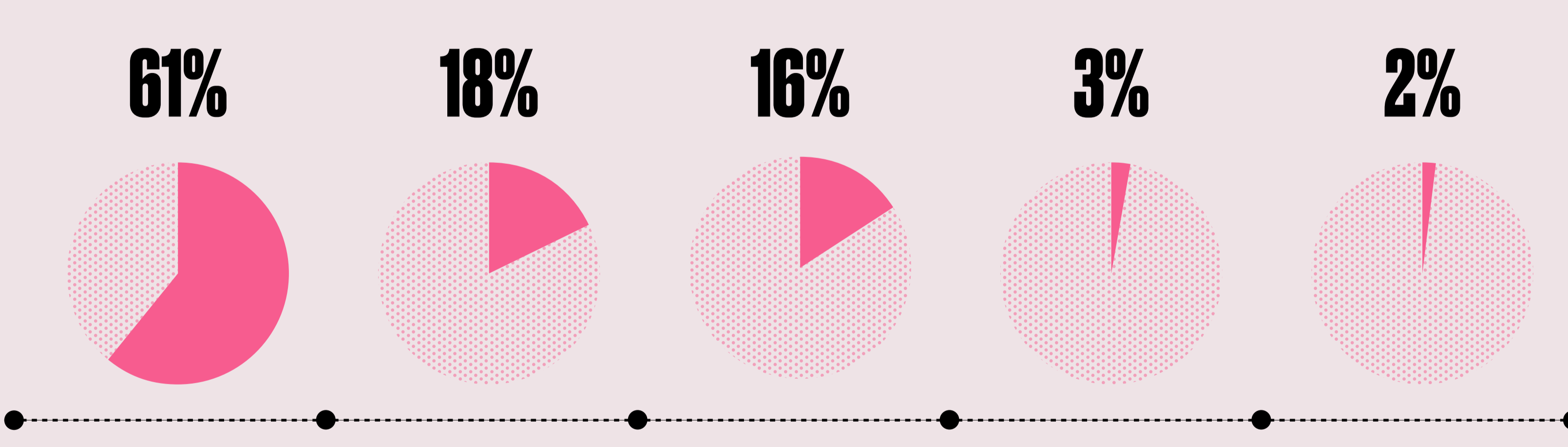
Which hedge fund strategy categories are investors considering reducing and increasing?



SURVEY PARTICIPANTS

Initial Allocation Size of Respondents

Most of our investor participants make initial allocations between \$1-25M (per hedge fund)



CONTACT US

Interested in learning more?
Contact our Prime Services' Capital Introductions team.

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