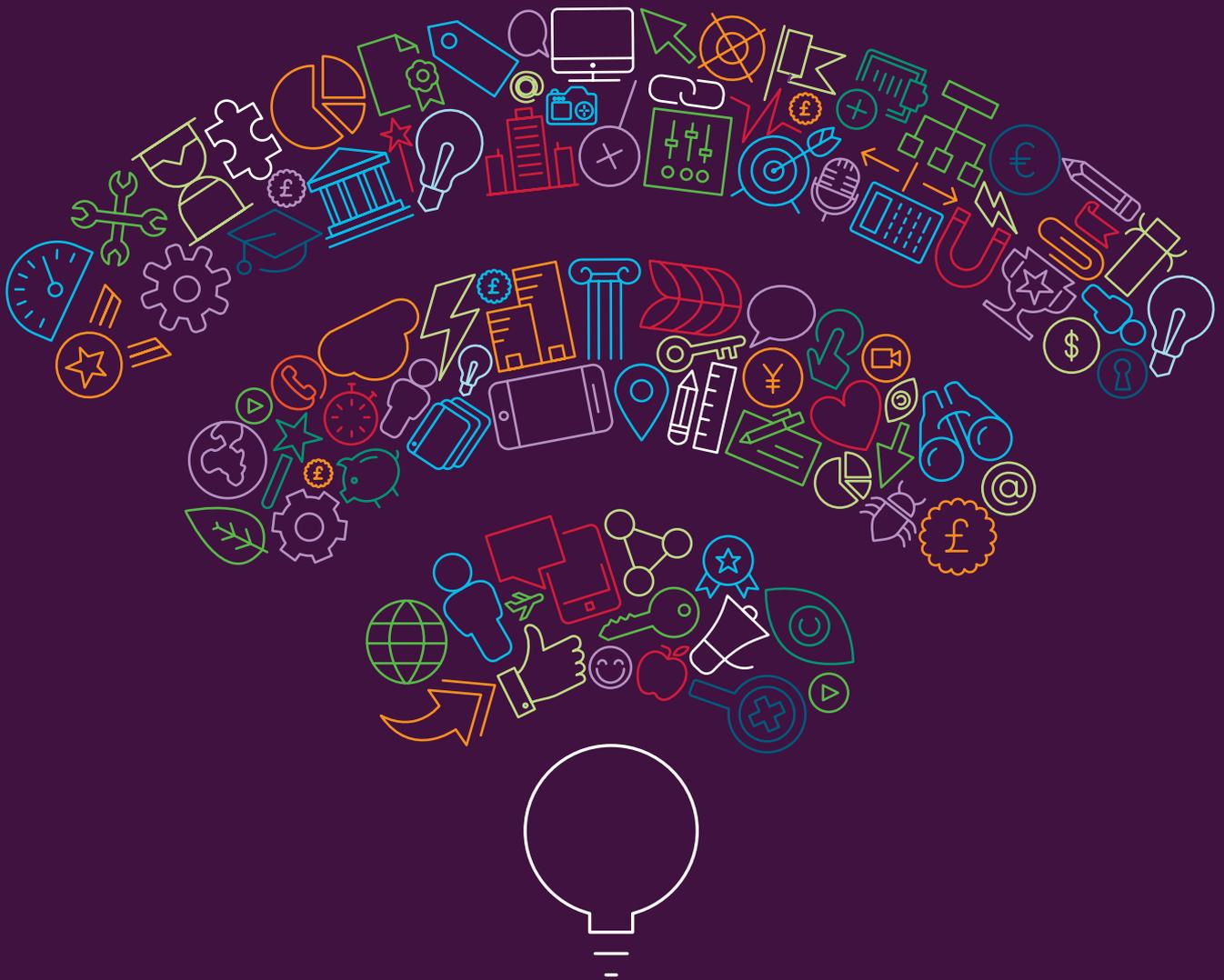


# Living Ratings

The brand and digital intelligence  
of the world's leading **asset managers 2018**



## Best practices in action

Find out how our proven analysis can  
improve your digital presence

## The winners and losers

The top 100 global asset managers rated and  
ranked in our most in-depth survey to date

## You can count on it!

All the key engagement and evidence  
statistics that matter to asset managers





**Kate Shaw,**  
Co-founder and  
Chief Executive Officer

October 2018

# Welcome to the latest edition of Living Ratings

Our 2017 analysis of asset managers' digital intelligence revealed that just 11 of the top 100 firms provided exceptional digital content and engaging functionality for financial advisers and intermediaries (FAIs). A year later, we are finding an improvement: more firms are now expressing a cohesive digital strategy and the leaders in our research are now focusing on the audience not themselves.

Zeroing in on their FAI audience and responding with the right digital intelligence enables the leading asset managers to enhance access to their firms and better inform the selection process. The firms that still fail to engage with FAIs are missing a valuable opportunity to both smooth the investment decision-making process and build enduring relationships to weather inherent and cyclical market volatilities.

It is reassuring to see that marketers are finally rethinking the view that positive financial performance negates the need for quality communications. Slightly more than half of asset managers now offer a clear intermediary proposition against a disappointing figure of only 15% in 2017. Likewise, 41% now provide high quality fund and strategy content, an encouraging rise over last year's mere 28%.

In 2017, some of the very basic needs of the advisory audience were being neglected. Just 29% of firms had created a document library; in 2018, that number stands at 62%. Yet, the quality of those libraries are mixed, with the best examples offering intuitive searches and helpful navigation, and the worst simply dumping PDFs onto their websites.

Targeted intermediary content has increased greatly. Today 78% of firms provide it against the 2017 figure of only 32%. The Top 5 ranked firms in our survey have invested energy and intellect in creating genuinely useful intermediary resources and tools, but too many of the others still simply group existing and often out-of-date content under the banner of intermediary content.

The leading firms have also thought hard about how and where their content will be viewed. A quarter of asset managers now offer an intermediary app, up 150% from last year. But our #1 ranked firm goes further still — J.P. Morgan Asset Management demonstrates an understanding of the 24/7 nature of work and the blurring of work/life boundaries by making their fund information accessible from Amazon Alexa and Google Home.

With confusing and confounding issues such as Brexit, global uncertainty and geo-political gamesmanship, thought leadership remains the most compelling way for an asset manager to express expertise. It is surprising therefore to see that only 39% of firms have targeted intermediary blogs. While the leading firms are using the opportunities afforded by the digital landscape to create and share engaging proprietary insights, the stragglers are choosing to only repurpose existing content without much imagination, leading to mixed results at best.

By contrast, efforts are being made to help build expertise and confidence for the intermediaries themselves as evidenced by

50% of firms now offering an intermediary education area.

Sharing content on social media has also improved with more asset managers engaging their target audience through various channels. An impressive 94% are now active on LinkedIn (vs. just 75% in 2017). Twitter also saw a 14% rise from last year with 81% firms now actively posting. It's not surprising therefore to see an increase in the use of video, animation and audio; these are some of the most effective social media tools and 72% of firms are now posting such content, vs. only 57% last year.

Yet, while this uptick is good, the content is often not. Our research reveals that asset managers still don't fully understand the importance of curating content or actively managing their social media presence.

Over the following pages we present our findings in detail and you'll see which firms have made great efforts to present a cohesive, compelling and user-first digital experience.

# About Ratings

Now in its 23rd edition, Living Ratings benchmarks the brand and digital effectiveness of the world's leading financial and professional services brands.

The studies provide our clients with evidence-based insight that continuously enhances their marketing communications and gives us unparalleled knowledge of our specialist sectors.

Recent studies include:



The brand and digital intelligence of America's leading wealth managers 2018



The brand and digital intelligence of the world's leading law firms 2018



The digital intelligence of the world's leading investment banks 2017

## Bespoke digital diagnostics for asset managers

In addition to our annual ratings report, we also offer an in-depth diagnostic of your website and social media footprint, analyzing your digital intelligence and comparing your firm against your closest competitors.

## The objective of the diagnostic is:

1. To analyze how your site performs against a set of proven benchmarks
2. To enable you to implement enhancements and corrections in line with best practice
3. To re-align your digital strategy to ensure that any future-generated content receives the maximum exposure with your target audience
4. To improve the user experience and information architecture of your website
5. To connect your social media strategy with your website
6. To ensure that your CMS platform is the right fit for your purposes and goals
7. To understand what is required to create a better digital experience for your external and internal target audiences (and to gain a higher Ratings score in the next review)

Our analysis is the logical first step on the journey to improve your brand and digital intelligence, providing you with objective evidence and a clear strategy.

# About Living Group

At Living we blend our deep sector knowledge, uncompromised thinking and award-winning creativity to help our clients in the financial, professional services and technology sectors create difference through branding expressions that engage, digital experiences that disrupt, and integrated advertising campaigns that drive results.



## What defines us

Our specialists' deep understanding of our clients' sectors means we challenge thinking and perception, inspire excitement and ambition, and help to deliver rewarding outcome. In a world that is always changing, content rich and visually crowded, we empower our clients to communicate their difference and stay ahead.

## What we do

### Engaging branding

Our creative teams in New York, London and Hong Kong deliver award-winning ideas with proven brand results. Driving your business performance with strategic thinking, brand creation and stand-out messaging, we fuse these key elements together to generate highly effective visual and verbal expressions of your firm.

### Disruptive digital

Our digital team connects your brand and your audiences. Around the world. Around the clock. We build seamless brand experiences online, using bespoke information architecture, engaging design and cutting-edge technology across multiple devices and platforms.

### Integrated campaigns

We can help transform your brand objectives into tangible business benefits – stimulating dialogue, lifting your profile, prompting consideration, and spurring action. We research, plan and execute advertising and social media campaigns worldwide, applying distinctive ideas and creative, backed by relevant analytics to measure your success.

### Creating difference for our people and communities

We don't just make a difference for our clients. We also make a difference for the talented people on our teams and the communities where we work. We have an open and collaborative culture that gives our people room to thrive. We encourage passionate, free-thinking ideas that challenge the conventional and celebrate individualism and diversity.

**Find out more at:**

[www.living-group.com](http://www.living-group.com)

# Who, what, when and how we rated

And how we classified each firm

## Who we rated

In August & September 2018 our analysts reviewed the digital communications of the top 100 asset managers (Source: ©IPE Top 400 Asset Managers published in June 2018). Each firm was rated against more than 50 criteria covering digital engagement (useful functionality) or evidence (substantive content) across four key categories.

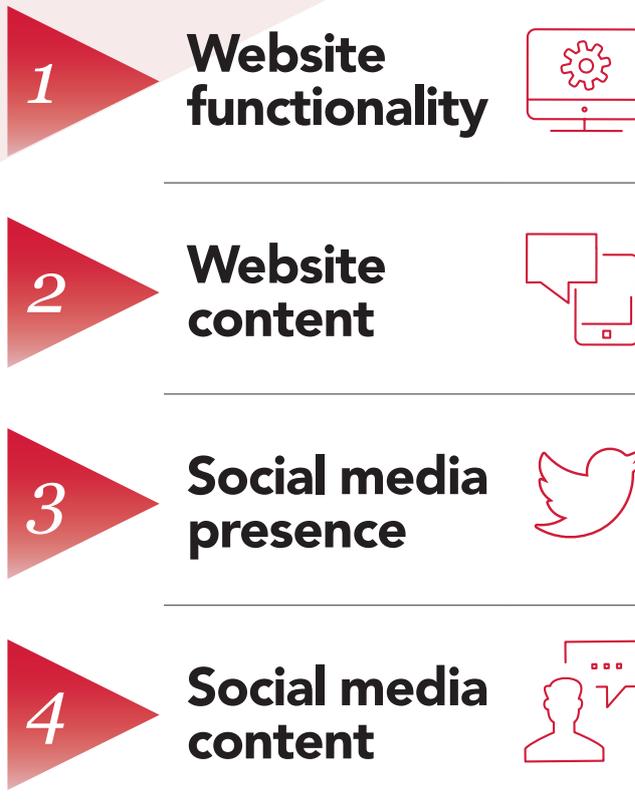
## What we rated

We examined each asset manager's publicly available digital footprint, from an intermediary perspective.

## How we calculate our scores

Each company is allocated an overall percentage score. This is calculated by adding the scores for the individually weighted engagement and evidence criteria. We then use the separate engagement and evidence scores to classify each asset manager with one of four definitions of their digital presence – Determined, Energetic, Focused or Lackluster.

Sector averages are based on the full listing of the top 100 firms. The five firms with the highest scores are also reviewed with expanded case studies.





# Are you determined, focused, energetic or lackluster?

By analyzing the individual engagement and evidence scores, we have categorized each of the leading firms' digital intelligence into four areas.



# Asset managers ratings and rankings

● Determined
 ● Focused
 ● Energetic
 ● Lackluster

Living Ratings 2018 Ranking	Living Ratings 2017 Ranking	2018 IPE Research Ranking	Firm name	Score / 815	%	Category
1 ↑	37=	7	J.P. Morgan Asset Management	672	82.45%	●
2 =	2	33	Schroder Investment Management	668	81.96%	●
3 ↓	1	71	Russell Investments	659	80.86%	●
4 ↓	3	8	PIMCO	654	80.25%	●
5 ↑	26	41	MFS Investment Management	647	79.39%	●
6 ↑	8	27	Franklin Templeton Investments	629	77.18%	●
7 ↓	5	40	Columbia Threadneedle Investments	625	76.69%	●
8 ↑	78	20	DWS (Deutsche Asset Management)	624	76.56%	●
9 ↑	28	37	AB (AllianceBernstein)	598	73.37%	●
10 ↓	6	1	BlackRock	584	71.66%	●
11 ↑	31	5	BNY Mellon Investment Management	583	71.53%	●
12	N/A	106	GAM	582	71.41%	●
13 ↑	16	26	Legg Mason	581	71.29%	●
14 ↓	10	2	Vanguard Asset Management	580	71.17%	●
15 ↓	4	15	T. Rowe Price	481	70.74%	●
16 ↑	70	14	Natixis Investment Managers	573	70.31%	●
17 ↑	35	80	Baillie Gifford & Co.	572	70.18%	●
18 ↓	7	101	Putnam Investments	570	69.94%	●
19 ↓	11	4	Fidelity Investments	567	69.57%	●
20 ↑	49	63	Macquarie Asset Management	566	69.45%	●
21 ↑	52	81	Guggenheim Investments	555	68.10%	●
22 ↓	19	12	Goldman Sachs Asset Management	553	67.85%	●
23 ↓	9	18	Invesco	552	67.73%	●
24 ↓	13	25	Aberdeen Standard Investments	551	67.61%	●
25 ↑	61	28	BNP Paribas Asset Management France	550	67.48%	●
26 ↑	79	46	HSBC Global Asset Management	544	66.75%	●
27 ↑	74=	76	BMO Global Asset Management	542	66.50%	●
28 ↓	14=	62	Janus Henderson Investors	539	66.13%	●
29 ↓	17	85	Voya Investment Management	537	65.89%	●
30 ↓	24	45	M&G Investments	534	65.52%	●
31 ↑	42	94	Robeco	530	65.03%	●
32 ↓	30	6	Capital Group	528	64.79%	●
33 ↓	21	100	American Century Investments	527	64.66%	●
34 ↑	66	93	Pictet Asset Management	525	64.42%	●
35 ↑	85	36	Generali Investments	522	64.05%	●
36	N/A	108	Lord Abbett & Co.	520	63.80%	●
37 ↑	86=	11	Legal & General Investment Management	518	63.56%	●
38 ↓	22	19	AXA Investment Managers	513	62.94%	●
39 ↑	56	55	Credit Suisse Asset Management	512	62.82%	●
40 ↑	64	47	Principal Global Investors	504	61.84%	●
41 ↑	50	16	Nuveen	503	61.72%	●
42 ↓	27	53	Charles Schwab Investment Management	499	61.23%	●
43 ↑	77	89	Lazard Asset Management	497	60.98%	●
44	N/A	96	Eastspring Investments	496	60.86%	●
45 ↑	96	42	Wells Fargo Asset Management	493	60.49%	●
46 ↑	47	84	NN Investment Partners	491	60.25%	●
47 ↓	32	59	Aegon Asset Management	481	59.02%	●
48 ↓	18	51	Eaton Vance	479	58.77%	●
49 ↓	23	9	Amundi	477	58.53%	●
50 ↓	33	102	First State Investments	452	55.46%	●

Note: BNY Mellon Asset Mngt. North America, Western Asset Management Company, Ostrum Asset Management, Mellon Capital, Fidelity International, Loomis Sayles & Company, BNY Mellon Cash Investment Strategies and Standish Mellon Asset Management have all been excluded from our analysis as their parent companies' sites were rated instead.

- Determined
- Focused
- Energetic
- Lackluster

Living Ratings 2018 Ranking	Living Ratings 2017 Ranking	2018 IPE Research Ranking	Firm name	Score / 815	%	Category
51 ↓	25	44	Aviva Investors	450	55.21%	●
52 ↓	20	10	Prudential Financial (PGIM)	445	54.60%	●
53 ↓	40	43	Morgan Stanley Investment Management	426	52.27%	●
54 ↓	36	72	Neuberger Berman	421	51.66%	●
55 ↓	43=	88	SEB	418	51.29%	●
56	N/A	103	KKR & Co.	416	51.04%	●
57 ↑	74=	87	AQR Capital	412	50.55%	●
58 ↓	55	82	Caisse de dépôt et placement du Québec	404	49.57%	●
59 ↓	39	30	Allianz Global Investors	397	48.71%	●
60 ↓	53=	66	RBC Global Asset Management	386	47.36%	●
61 ↓	45	23	Insight Investment	383	46.99%	●
62 ↓	43=	65	SEI	382	46.87%	●
63 ↑	72	91	Nikko Asset Management	376	46.13%	●
64 ↓	46	64	Barings	375	46.01%	●
65 ↑	82	97	Bram - Bradesco Asset Management	371	45.52%	●
66 ↑	67	38	New York Life Investment Management	370	45.40%	●
67 ↓	37=	3	State Street Global Advisors	358	43.93%	●
68 ↑	99	21	Affiliated Managers Group	355	43.56%	●
69 ↓	41	17	Northern Trust Asset Management	352	43.19%	●
70	N/A	105	Zürcher Kantonalbank	343	42.09%	●
71 ↓	59	32	Dimensional Fund Advisors	328	40.25%	●
72 ↑	89	60	Eurizon Asset Management	326	40.00%	●
73 ↓	71	22	UBS Asset Management	321	39.39%	●
74 ↓	14=	49	Blackstone	317	38.90%	●
75 ↑	97	13	Wellington Management International	313	38.40%	●
76 ↓	63	35	APG	312	38.28%	●
77 ↓	68	75	PGGM	310	38.04%	●
78 ↓	48	74	Nordea Investment Management	286	35.09%	●
79 ↑	93	79	Apollo Global Management	266	32.64%	●
80 ↑	91	54	Federated Investors	260	31.90%	●
81 ↑	94	29	Mitsubishi UFJ Trust and Banking	254	31.17%	●
82 ↑	83	70	MEAG	250	30.67%	●
83 ↓	65	68	DekaBank	236	28.96%	●
84 ↑	92	31	MetLife Investment Management	228	27.98%	●
85 ↓	80	98	Itaú Asset Management	224	27.48%	●
86	N/A	107	Lyxor Asset Management	221	27.12%	●
87 ↓	51	86	Swiss Life Asset Managers	219	26.87%	●
88 ↓	69	58	Union Investment	209	25.64%	●
89 ↑	90	69	Dodge & Cox	207	25.40%	●
90 ↓	73	57	Manulife Asset Management	193	23.68%	●
91	N/A	73	Stifel Financial Corp.	189	23.19%	●
92 ↓	62	90	Santander Asset Management	184	22.58%	●
93	N/A	99	Bank J. Safra Sarasin	182	22.33%	●
94 ↓	88	92	The TCW Group	173	21.23%	●
95 ↓	81	50	Nomura Asset Management	170	20.86%	●
96 ↑	100	24	Sumitomo Mitsui Trust Bank	151	18.53%	●
97 ↓	86=	77	La Banque Postale Asset Management	139	17.06%	●
98 ↓	95	39	Asset Management One International	130	15.95%	●
99 ↓	76	56	Geode Capital Management	125	15.34%	●
100	N/A	95	E Fund Management Co.	72	8.83%	●

Note: BNY Mellon Asset Mngt. North America, Western Asset Management Company, Ostrum Asset Management, Mellon Capital, Fidelity International, Loomis Sayles & Company, BNY Mellon Cash Investment Strategies and Standish Mellon Asset Management have all been excluded from our analysis as their parent companies' sites were rated instead.

# Engagement and evidence: the leaders



## Determined asset managers build experiences for their users

Asset managers that take a determined approach to digital engagement have a relentless client focus. Their successful formula combines two key elements:

### 1. Engagement.

Determined asset managers recognize the potential of useful digital functionality backed by a client-focused channel strategy.

They can then create appealing and relevant content in a variety of media, including stimulating graphics, audio, animation and video.

### 2. Evidence.

Determined asset managers promote clear purpose. They offer the user informative messaging, relevant subject matter and the kind of insight that shows a deep understanding of client issues and interests.

This demonstrates the ability to help clients succeed.

### The risks of lackluster digital communication

Without strong digital brands, firms are in danger of becoming commodities, selected purely on price. After all, if one asset manager's products are the same as another, why pay more?

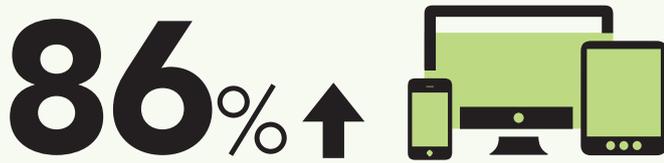
## Engagement Our top 10

1	J.P. Morgan Asset Management
2	Franklin Templeton Investments
3	Schroder Investment Management
4	Fidelity Investments
5	Russell Investments
6=	PIMCO
6=	BlackRock
8	Goldman Sachs Asset Management
9	GAM
10	Natixis Investment Managers

## Evidence Our top 10

1	MFS Investment Management
2=	Russell Investments
2=	PIMCO
4	Schroder Investment Management
5=	Columbia Threadneedle Investments
5=	DWS (Deutsche Asset Management)
7	J.P. Morgan Asset Management
8	Legal & General Investment Management
9=	AB (AllianceBernstein)
9=	Legg Mason

# The numbers that define asset managers: engagement



of firms have a responsive website. 2017: 56%



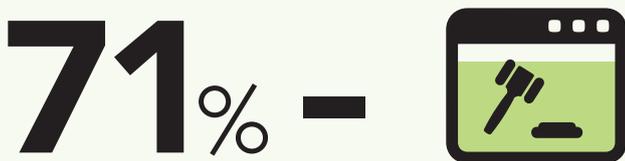
of websites employ user profiling. 2017: 55%



of websites provide guided navigation. 2017: 65%



of websites offer an intermediary education area. 2017: 22%



is the average SEO score for websites. 2017: N/A



feature a login area for intermediaries. 2017: 40%

Our research reveals that asset managers still don't fully understand the importance of curating content.

**35%** ↑



of websites offer intermediary tools. 2017: 29%

**25%** ↑



of websites offer an intermediary app. 2017: 10%

**94%** ↑



of firms are active on LinkedIn. 2017: 75%

**81%** ↑



of firms are active on Twitter. 2017: 71%

**40%** ↑



of firms are active on Instagram. 2017: 17%

**66%** ↑



of firms are active on Facebook. 2017: 42%

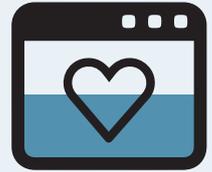
# The numbers that define asset managers: evidence

48% ↓



state their brand positioning upfront on their home pages. 2017: 68%

48% -



of firms communicate their brand values on their websites. 2017: N/A

42% -



have consistent visual language across their digital channels. 2017: N/A

28% ↓



of firms use infographics across their websites. 2017: 74%

78% ↑



of firms provide targeted intermediary content. 2017: 32%

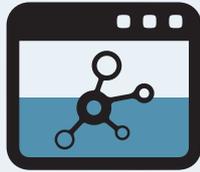
55% ↑



offer a clear intermediary proposition. 2017: 15%

Asset managers continue to expand their digital footprint, especially on social media, but targeting FAs specifically trails behind.

**41%** ↑



provide high quality fund and strategy content. 2017: 28%

**60%** ↓



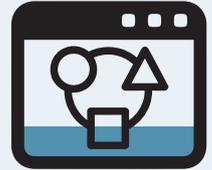
of firms have graduate / college recruitment content. 2017: 61%

**72%** ↑



of firms use video, animation or audio. 2017: 57%

**24%** ↑



have diversity-related content. 2017: 23%

**39%** ↑



of firms have targeted intermediary blogs. 2017: 25%

**62%** ↑



have a document library. 2017: 29%

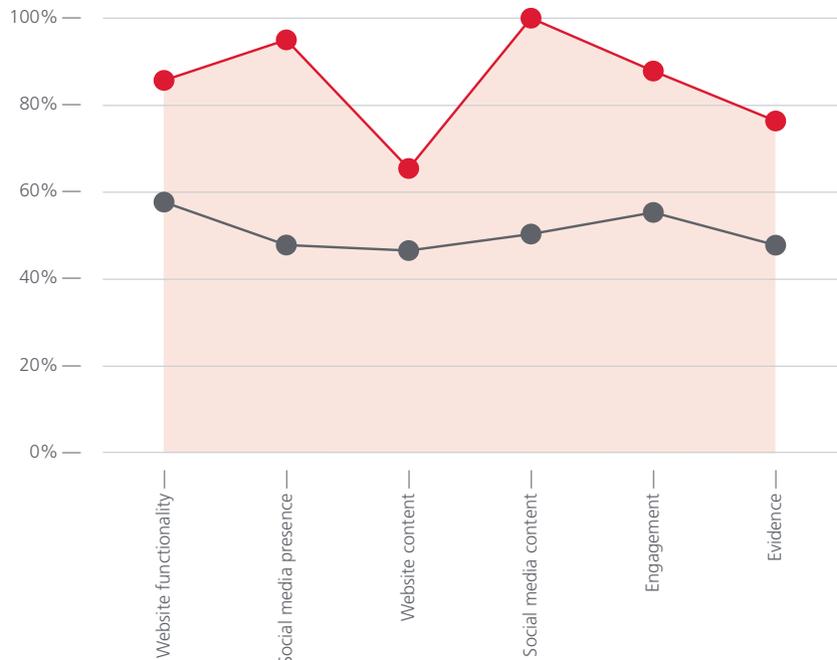


# J.P. Morgan Asset Management

www.am.jpmorgan.com



● J.P. Morgan Asset Management  
● Sector average



## Sector leading digital empowerment

### Key features

- ▶ Sector leading tools
- ▶ Dedicated 'insights' app
- ▶ Engaging fund information
- ▶ Exemplary use of social media

Building from a strong client proposition J. P. Morgan Asset Management ably demonstrates their focus on the investment professional across all of their digital landscape.

Their content talks about enabling and empowering their advisor audience and they effortlessly achieve this by delivering industry-

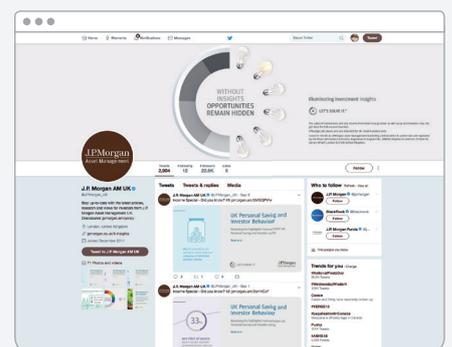
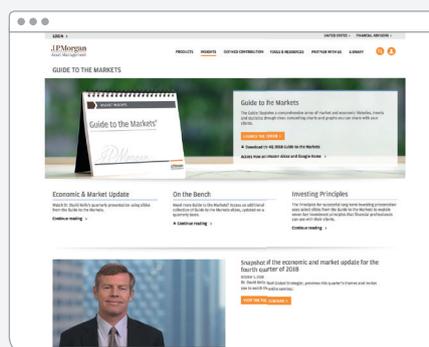
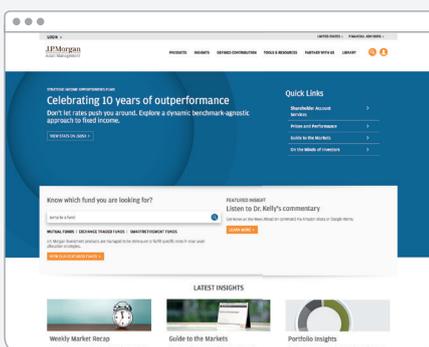
leading analytics tools and insights across the site. The strength and effectiveness of those tools is just one reason that they occupy the number one position this year. Another example is their powerful 'Insights App' which allows the tailoring of content; this is a rich and useful advisor-centric resource.

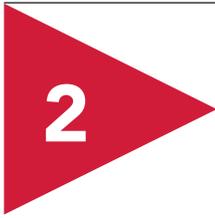
In competitor sites, fund information is often presented as a dull page of numbers. But J.P. Morgan Asset Management offers a well-curated, navigable page with clear detail on current values; in addition, there's engaging information and pullouts on the portfolio managers, their overall strategy, and useful fast facts.

The opportunity to test investment scenarios in the 'Hypothetical Tool' is an excellent and helpful feature. The fact that their 'Guide to the markets' is accessible from Amazon Alexa and Google Home is another way they prove how they understand the real-life working habits of the target audiences.

Their social media channels are equally good, in fact only J. P. Morgan Asset Management scored maximum points for their use of social media in our Ratings research.

Images © J.P. Morgan



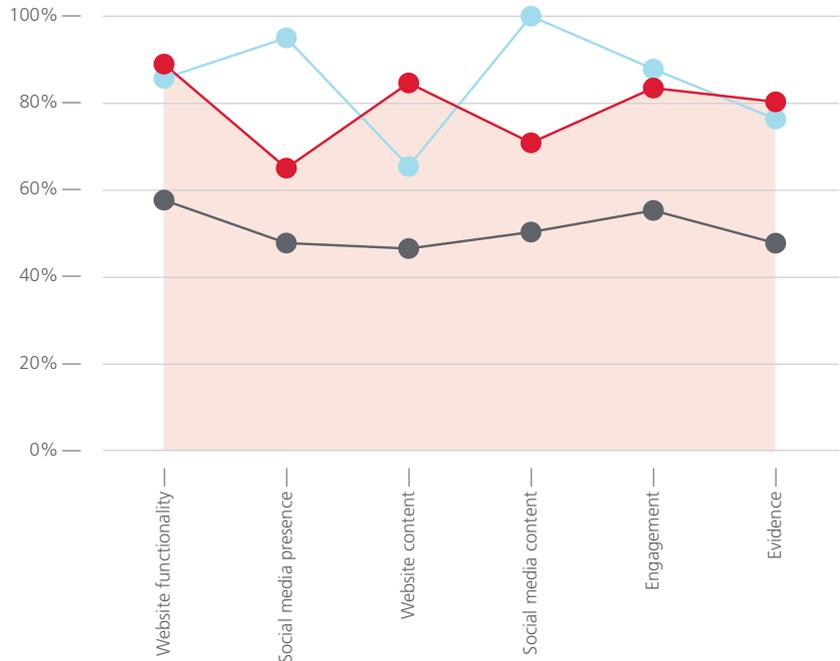


# Schroder Investment Management

www.schroders.com



- Schroder Investment Management
- Sector average
- Sector leader



## Exemplary digital experiences

### Key features

- ▶ Opportunity to personalize pages
- ▶ Creative and rich infographics
- ▶ Strong and numerous insights
- ▶ An informative and entertaining experience

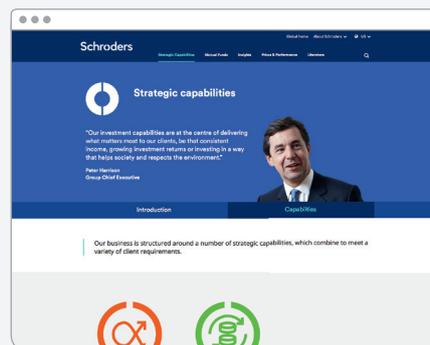
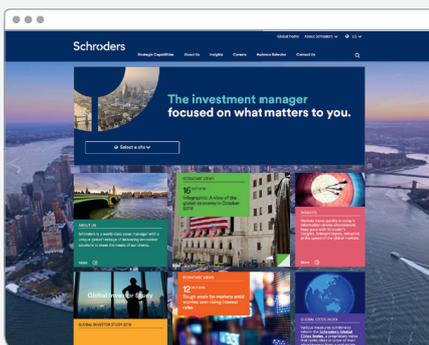
Schroder Investment Management has delivered an exemplary advisor-centric site. They occupy a worthy second place in our Ratings research this year; they were kept out of the top slot only because their social media presence was not as strong as first place ranked J. P. Morgan Asset Management.

Navigation is intuitive and clear and unlike many competitor sites which bounce you to microsites within the main site, Schroders has curated a truly advisor-centric experience.

They also lead the way on personalization, in fact, they are the only site in our survey to offer the opportunity to create a personal page with user selected content. Their own description of this page 'Get tailored results for faster insights to your favorite funds and topics' admirably demonstrates their focus on and understanding of advisors' needs. The use of infographics to clearly explain global and financial trends is a strong feature on this site; these well-executed graphics serve as excellent introductions to the deeper content available.

Insights and thought pieces are current and numerous, most of the content proprietary, it is refreshing to see an organization make so much investment in producing quality and focused content. The overall result is a confident, rich and informative site supported by good use of social media channels. Most importantly, in a competitor landscape full of dull and un-engaging experiences, Schroders creates a truly entertaining experience, something that we are sure will be valued by an advisor and lead towards deeper engagement.

Images © Schroder Investment Management

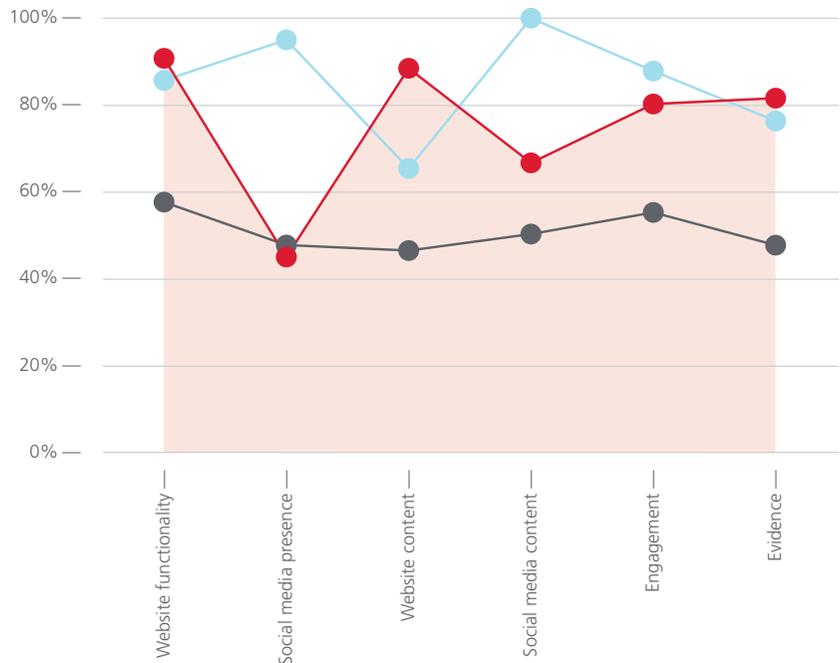


# 3 Russell Investments

www.russellinvestments.com



- Russell Investments
- Sector average
- Sector leader



## An elevating experience

### Key features

- ▶ Helpful 'overview' pages
- ▶ Powerful tools to create end client proposals
- ▶ Strong balance of targeted and corporate information

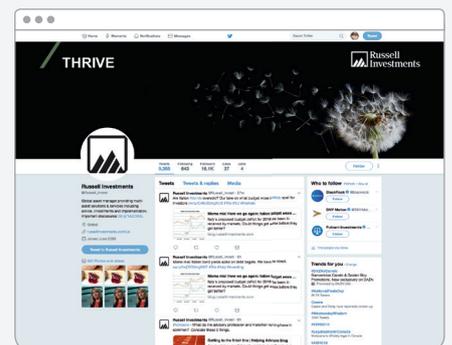
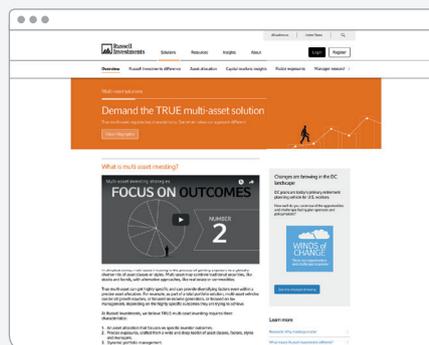
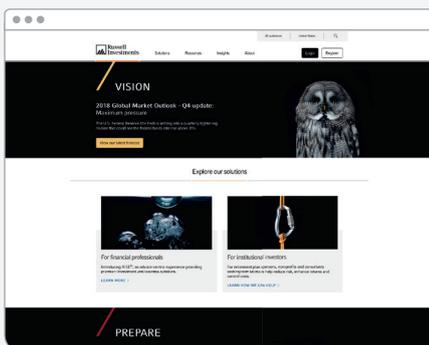
Russell Investments' advisor-centric focus is perfectly demonstrated by their hub 'RISE,' which grants access to their latest insights, expertise, tools and advice. With a promise to 'Elevate your business,' their content across all of their digital platforms does not disappoint. Their well-written and engaging 'overview' pages, which feature infographics, along with their equally rich strategy pages, are two reasons why they made it to third place in our Ratings research.

Russell Investments' powerful and distinctive brand is reinforced with equally powerful interactive tools; their 'Multi-Asset Portfolio Builder' allows users to create high quality

proposals for use with their end clients. There are also a number of intuitive dashboards which deliver complex data with visual simplicity.

Russell Investments rightly scored overall highest in our Ratings research in the website content review and they have managed to create a seamless experience that delivers both audience specific content and deep corporate insights. These combine to deliver a compelling picture of both sector expertise and good corporate practice.

Images © Russell Investments

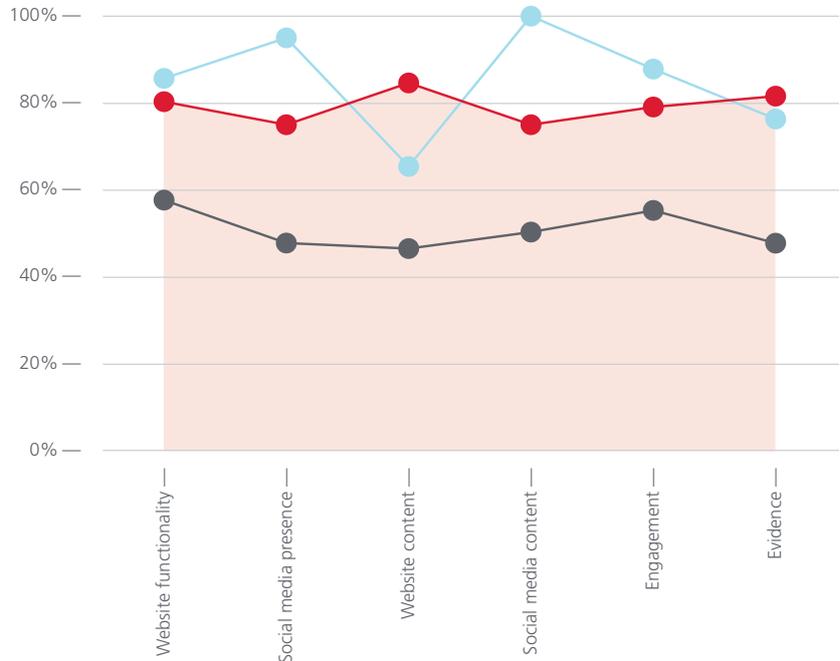


# 4 PIMCO

www.pimco.com



- PIMCO
- Sector average
- Sector leader



## A compelling digital footprint

### Key features

- ▶ Excellent and informative insights
- ▶ Helpful features like 'smart charts'
- ▶ Good fund information

PIMCO may not have the richest content and experience of the other firms in our Ratings top 5 but it delivers a compelling and solid experience, nonetheless.

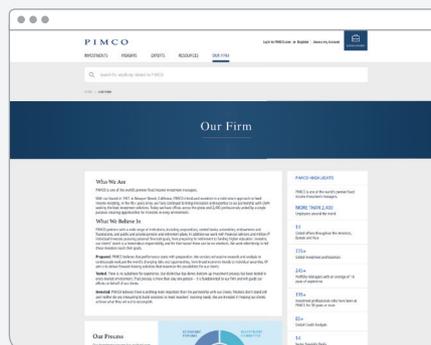
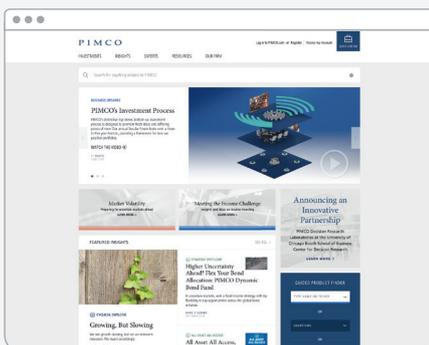
Their economic and market commentary clearly demonstrates a deep understanding and a skill in bringing clarity to the complex global trends

that will impact investment performance. Labeling the page of staff biographies as 'Experts' is a nice touch that reinforces the overall feeling of insight and knowledge.

PIMCO 'Smart Charts' is a resource specifically designed for intermediaries. It offers a large library of well-designed tables, charts and info-graphics which can be easily searched and downloaded ready for inclusion in presentations. Much of the useful content can also be accessed by a single point of entry called the 'Intermediary Center'. The fund detail is excellent and follows the same format and offers the same

quality of information as J. P. Morgan Asset Management's fund pages. The PIMCO Blog pages are equally strong and deliver excellent proprietary content that is current and well written. The "My Content" area is also one of the best examples of personalization in the sector, allowing you to save and share, print and subscribe. PIMCO's use of social media platforms is varied in quality and output quantity with their Twitter feed offering the strongest content.

Images © PIMCO



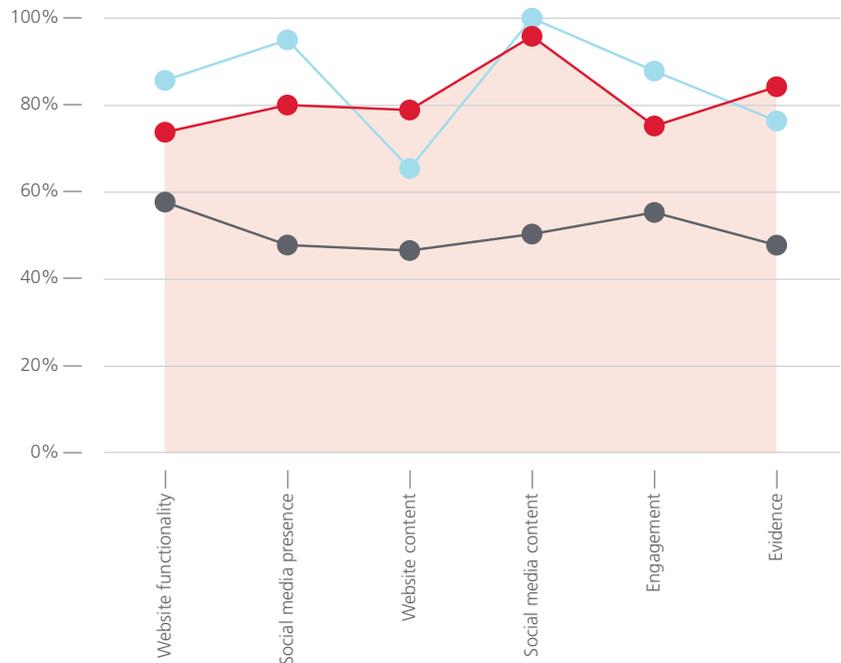


# MFS Investment Management

www.mfs.com



- MFS Investment Management
- Sector average
- Sector leader



## It's all about you

### Key features

- ▶ Convincing focus on investment professionals
- ▶ Easy to navigate Fund information
- ▶ Strong balance of targeted and corporate information
- ▶ Upfront contact information and team biographies

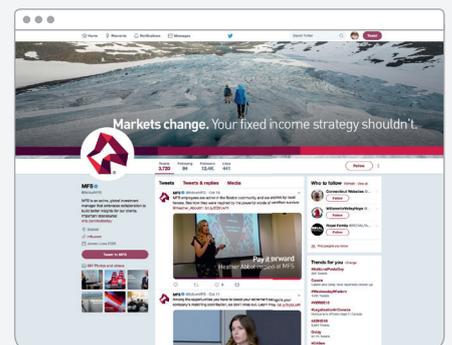
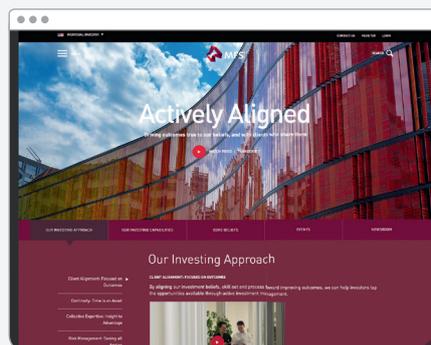
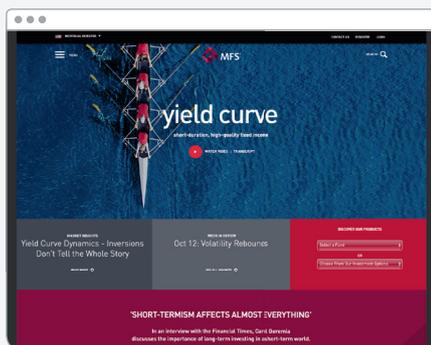
MFS Investment Management has put supporting investment professionals at the center of their brand and this is demonstrated across all of their digital footprint. From the powerful and straight-talking tone of voice that addresses the audience directly, to the concept of 'Growing your business' and the focus on helping to address the user's client needs, MFS Investment Management delivers a truly audience-centric experience.

The prominent and upfront contact details and team biographies all support their reputation as a human and genuine company who is ready and willing to build valuable relationships.

There is a variety of high quality content delivered in an equally wide variety of media. The requirement to deliver the detail on strategy and product information is achieved well. Fund information is delivered via excellent and intuitive navigation.

MFS Investment Management occupies a worthy fifth position in our Ratings research table. It's a high quality resource where the sum of its parts adds up to a convincing reason to do business with them.

Images © MFS Investment Management



6 > 10

## 6 Franklin Templeton Investments

[www.franklintempleton.com](http://www.franklintempleton.com)



### Key features

- ▶ Comprehensive resources for advisors
- ▶ Rich media content in blogs
- ▶ Extended content throughout
- ▶ Dedicated helping clients plan area

## 7 Columbia Threadneedle Investments

[www.columbiathreadneedleus.com](http://www.columbiathreadneedleus.com)



### Key features

- ▶ Brand-driven digital experience
- ▶ My funds customization
- ▶ Investor goal-related content
- ▶ Insights include conversation toolkits

## 8 DWS (Deutsche Asset Management)

[www.dws.com](http://www.dws.com)



### Key features

- ▶ Bold and progressive rebrand
- ▶ People focus with experts profile
- ▶ Strong insights and thought leadership
- ▶ Integration of Morningstar tools

## 9 AB (AllianceBernstein)

[www.alliancebernstein.com](http://www.alliancebernstein.com)



### Key features

- ▶ Strong brand experience
- ▶ Use of most popular content in insights
- ▶ Improved fund pages
- ▶ Related content throughout

## 10 BlackRock

[www.blackrock.com](http://www.blackrock.com)



### Key features

- ▶ Advisor-centric content
- ▶ Plethora of tools and guides
- ▶ Clear social media strategy
- ▶ Strong use of graphics, video



Want to know how your firm has scored across each of our key criteria?

Please get in touch to arrange a meeting.



# Get in touch

## What's your score?

If you're interested in receiving a detailed analysis of your firm's digital brand intelligence... or if you'd like to pursue the benefits of an updated website, more relevant and engaging content, or a more effective social media strategy, we'd love to help you. You can contact us at [life@living-group.com](mailto:life@living-group.com) or directly at one of our global offices:



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# Living Ratings

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