

30 YEARS - INSTITUTIONAL INVESTOR PUBLISHES 2022 LATIN AMERICA RESEARCH RANKINGS

Domestic BTG Pactual achieves first place in the leader's table as this year's top research provider in Latin America.

6th July 2022 (8am NY)

Now in its 30th year, the Institutional Investor Latin America Research survey determines the best-in-class of sell-side research and provides valuable qualitative market feedback from market participants on optimising the provision, acquisition and consumption of Research Advisory services across Latin America. Performance analysis on the data output allows in-depth comparative analytics which can be used for strategic business decision-making.

This year's survey included a new category, Education, allowing asset managers to recognise value at those firms that provide top quality education research. In total, voting took place across 20 industry sectors (including macro) and across Argentina, Chile, Mexico and North Andean Countries.

II Research has re-launched the Trading & Execution surveys on the new voting platform alongside Sales, Corporate Access and Research in all of our global equity surveys. Latin America Trading results will be published on 7th July. The survey was polled at two levels: pan-regional, across several attributes and at the country level.

The results of the survey reflect the opinions of 630 portfolio managers and analysts at 408 institutions.

Esther Weisz, Director of Sales, Americas says "Latin American markets have historically been more resilient during periods of financial distress. During the early stages of the Covid 19 pandemic, Latin America showed a higher drawdown compared to other EM regions but showed a steeper recovery. The region is showing signs of further growth prospects this year; inflation is driving investors to look at Brazil, Chile, Peru and Columbia that are strong commodity exporters. As consumers of institutional research navigate the financial landscape through unusual times, limited physical interactions have contributed to a need for building relationships built on trustworthy sources. Our survey data is more important than ever as investors endeavour to understand the market and rely on independent feedback to identify Latin America's top-performing research providers."

Results Highlights

BTG Pactual, a Latin America-based company, achieved first place this year in the firm commission-weighted leaders' table with 24 published positions; global bank J.P. Morgan attained a close second place with 23 total published positions. BofA Securities came in third place with 16 positions and Bradesco BBI climbed the leader board to reach fourth place with 15 positions. UBS follow in fifth place (11 positions), Santander in sixth (10 positions) and Citi and Credit Suisse in joint seventh place (nine positions).

The Latin America Research results can be found here: <https://www.institutionalinvestor.com/research>



Investment professionals from the buy-side were invited to vote during a four-week period; increasingly votes are submitted centrally from investment management firms to reflect their formal internal research evaluation processes. This has reduced the disruption to the industry and increased the accuracy of the final results.

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