

Sales & Corporate Access



Sales

The *Institutional Investor Research Equities Survey* is a unique measure of qualitative performance across Regional Sales. Conducted as part of the broader equity surveys in Asia, Europe and the Americas, II Research captures independent evaluation of sell-side sales performance from portfolio managers and analysts on the buy-side. Whilst MiFID II initially impacted the relative importance of research sales in the flow of advisory services, the role has returned with a vengeance and represents a material contribution to the advisory evaluation process. Sales performance is presented across six attributes, which are published separately and aggregated to deliver an overall leading broker on a regional basis. The output will inform strategic decision making, present detailed peer-to-peer comparative analyses and enable sell-side firms to independently validate their client feedback.

Attributes:

- Understanding Client Needs
- Adding Value to Research
- Idea Generation
- Service & Responsiveness
- Global Content
- Market Knowledge & Feel

Published Results:

- Best Firms Weighted by Commission
- Best Firms Weighted by AuM



Corporate Access

The *Institutional Investor Research Equities Survey* is a unique measure of qualitative performance across Regional Corporate Access. Conducted as part of the broader equity surveys in Asia, Europe and the Americas, II Research captures independent evaluation of sell-side corporate access performance from buy-side corporate access coordinators, portfolio managers and analysts. Whilst MiFID II prevented the specific payment for corporate access beyond "administration" charges, it is well-recognised that corporate access is still one of the most important services provided by brokers to their clients in the asset management industry. Corporate Access performance is presented across six attributes, which are published separately and aggregated to deliver an overall leading broker on a regional basis. The output will assist with corporate relationships, present detailed peer-to-peer comparative analyses and enable sell-side firms to independently validate their client and corporate feedback.

Attributes:

- Field Trips
- Team Quality
- Logistics
- Conferences
- Roadshows
- Virtual Events

Published Results:

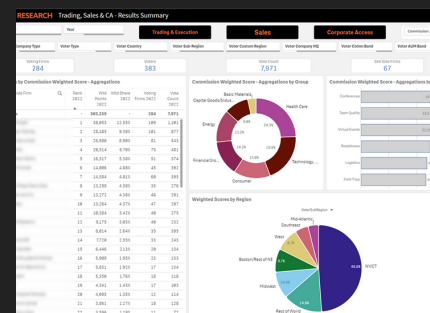
- Weighted by Commission
- Weighted by AuM



II Insights Dashboard:

The Dashboard is designed to explore and analyse survey data, providing actionable insights for company strategy and competitive positioning.

Contact us to request a demonstration.



For more information, contact marketing@iiresearch.com