



**AROUND ASSET MANAGEMENT**  
**PROFILING ONLINE INNOVATORS**  
VOLUME ONE

corporate  
**Q**insight

# ABOUT CORPORATE INSIGHT

[Corporate Insight](#) (CI) provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, Corporate Insight has tracked new developments in the financial services industry through our *Monitor* research services and custom consulting services. We are known for our detailed, objective research, unmatched expertise, and emphasis on the actual user experience. There are no assumptions in Corporate Insight's work – we use live accounts at the firms we track to benchmark their effectiveness across all major channels and give our clients unparalleled competitive intelligence.

Corporate Insight is continuously tracking and identifying best practices in online asset management, banking and investing, insurance, annuities, mobile finance, active trading platforms, social media and other emerging areas. In the process, we have helped our clients -- which cover the entire spectrum of financial services -- to stay on top of industry trends and improve their competitive position.

Our research and analysts are frequently cited in financial media outlets such as The Wall Street Journal, Barron's, Bloomberg, CNBC, Forbes and SmartMoney and news publications like the Associated Press, New York Times, Newsweek, TIME and USA Today.

## MEDIA AND PR INQUIRIES

Corporate Insight is open to having its research cited for marketing purposes. We are also happy to discuss our research further with the media. Should your firm wish to cite any of our research, please contact Ben Pousty, Marketing Manager, at 646-454-2662 or [bpousty@corporateinsight.com](mailto:bpousty@corporateinsight.com) to coordinate approval. To set up a media interview with one of our analysts, please contact our PR firm, Intermarket Communications, at 212-888-6115 or [corporateinsight@intermarket.com](mailto:corporateinsight@intermarket.com).

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## CONNECT WITH CI



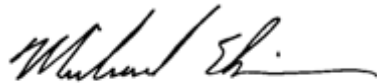
Dear Reader,

Thank you for downloading **Around Asset Management: Profiling Online Innovators**. At Corporate Insight, our mission is to analyze and understand the trends and innovations that will shape the future of the financial services industry. We place a special emphasis on assessing the online prospect, customer and advisor experience offered by leading firms as well as the mobile and other digital practices that are changing the way financial institutions interact with consumers.

Volume one of CI's Around Asset Management series examines eight asset management firms that excel in different areas of the online experience they offer consumers. There were no throwaway firms; each offers a noteworthy online capability or design element that can improve the websites offered by asset management firms. We will continue to keep a close eye on the asset management industry and review new online and digital innovations introduced by asset managers in the future.

We hope you find this whitepaper valuable. Happy reading!

Sincerely,



Michael Ellison, President  
Corporate Insight, Inc.



To learn more about our *Advisor Monitor* and *Mutual Fund Monitor* research services and other asset management research solutions, please contact **Jeff Latzer**, head of asset management research, at 646-751-6965 or [jlatzer@corporateinsight.com](mailto:jlatzer@corporateinsight.com).

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## INTRODUCTION

Corporate Insight's *Mutual Fund Monitor* service reviews the online capabilities and features for 17 asset management firms. Our *Advisor Monitor* service covers 19 firms. Through these products, we present a complete overview of what is happening with our coverage firms through timely, bi-weekly *Updates* as well as topical monthly research reports. While these materials provide an excellent analysis of the asset management firms we track, we want to expand our research to offer a better view of the industry as a whole by examining firms outside the scope of our standard asset management coverage group. The [Around the Industry](#) series on the [Corporate Insight Blog](#) serves just such a purpose and in this whitepaper we compile, summarize and elaborate on our most important findings.

Each firm in the *Around the Industry* series was evaluated on its homepage design and accessibility, fund profile pages, commentary resources and – where applicable – investment tools, responsive design and mobile usability. As the series progressed, it became clear that the firms' online offerings excelled in different areas. For example, Royce Funds innovates with excellent web design, while Matthews Asia offers particularly great industry commentary and thought leadership.

This whitepaper identifies eight standout asset management firms that demonstrate innovative online design or capabilities. The firm profiles are grouped into four categories celebrating the best examples of homepage design, fund profiles, commentary resources and innovative Web design. Each profile summarizes the firm's general online features and explores its standout elements in closer detail. While some firms excel in multiple website areas, we decided to highlight the very best element of each one. In all cases, we examined the firms' public investor sites.

# STANDOUT FUND PROFILES

## CALVERT INVESTMENTS

[Calvert Investments](#) is a Maryland-based firm that places special emphasis on socially and environmentally responsible investing. With a total AUM of around \$12.5 billion, the firm maintains its own Calvert Social Index to monitor sustainable companies and sponsors the [Calvert Foundation](#), which delivers impact investment expertise to underserved markets. We reviewed [Calvert's online and social media charitable resources](#) last year, it was the first firm profiled in the *Around the Industry* series.

### Homepage

As is typical of many Asset Management sites, Calvert's homepage features a rotating banner image promoting the firm's funds, webcasts and commentaries. In addition, the homepage promotes thought leaders and lists new commentaries and news. The firm also uses the homepage to promote its Sustainable & Responsible Investing campaigns (SRI), which are essential to the firm's brand identity and investing strategy.

### Commentary

Unfortunately, Calvert's commentary resources are not organized particularly well. For example, although the firm hosts a high volume of both print and video commentaries on its public website, it does not offer a centralized commentary section or a sound method for searching or filtering through the available items. In addition to general market and fund commentaries, the firm does offer a number of engaging [Special Reports](#) that address issues such as sustainable investing or the inclusion of women in finance, but these lack a clear publication schedule and suffer from the same organizational problems as other commentary resources.

### Fund Profiles

The site's fund profiles are its standout feature. They follow a typical template – spreading information across seven tabs for Overview, Performance, Pricing, Holdings, Management & Commentary and Fees & Minimums – but include all the elements users would expect from top tier asset managers. The profiles offer hypothetical growth charts, allocation graphics, rate of return tables and comparisons to index benchmarks, among other features. Calvert's fund profiles could be even better if they were more interactive (i.e., if performance charts were more customizable), but overall they compare quite favorably to others in the industry.



Calvert Fund Profiles

### Closing Thoughts on Calvert Investments

Calvert Investments offers a generally strong asset management website. It boasts a strong, vocal homepage that accentuates its unique brand and standout fund profiles that echo some of the better elements of top sites across the industry. In other areas, such as tools and commentaries, the firm is unfortunately less impressive. However, the key issues in those areas lie not in a lack of quality or quantity of content, but rather in navigation and presentation, which are easier to correct.

## THORNBURG INVESTMENT MANAGEMENT

With around 240 employees and a small family of 16 funds, New Mexico-based [Thornburg Investment Management](#) marshals a hearty \$87 billion in assets. The firm's relatively small size and strong ties to the New Mexico community present an interesting contrast to many of the larger, more geographically expansive firms we monitor on a regular basis.

### Homepage

When considered in the broader context of the asset management industry, Thornburg's public homepage does not make a strong first impression. In terms of design, complexity and overall polish, it lags behind industry leaders. However, since our initial review of the site in July, the firm added a rotating image display that slightly increases the homepage's functionality and appeal.

### Commentaries

The site's Research tab offers fund-specific insights from Thornburg managers as well as more general market commentaries in the [Thornburg Articles](#) section. The commentaries themselves are very well put together and reflect the same color scheme and visual themes of the main website, which, as is the case with other firms, presents a more unified sense of brand identity.

### Fund Profiles

Standing in sharp contrast to the homepage, Thornburg's fund profiles are much more modern and engaging and feature many elements common to the best asset management sites in the *Mutual Fund Monitor* coverage group. The profiles are spread across five tabs: Overview, Performance and Expenses, Attributes and Holdings, Management and More Info, which includes materials like financial reports or tax information.

The Performance and Expenses tab includes a hypothetical growth of \$10,000 chart in addition to the standard-issue annualized return tables. The Attributes and Holdings tab features plenty of pie charts illustrating asset and sector allocation, and, for internationally-focused funds, a world map labeled by equity holdings percentages.



## Thornburg International Value Fund

**Please Note:** As of August 1, 2009, Thornburg Investment Management no longer offers Class B Shares. See the [current prospectus](#) or the [following page](#) for more information.

Overview

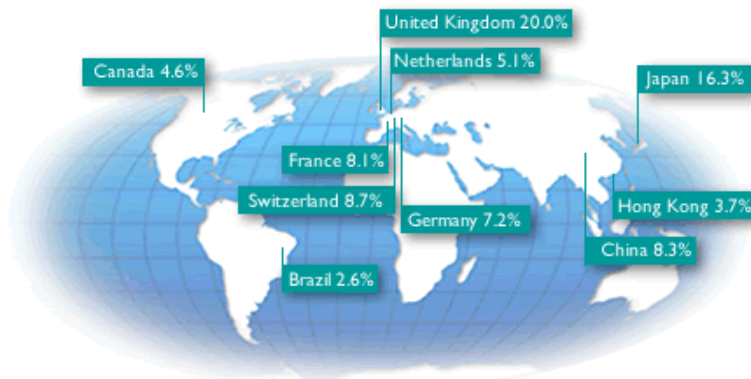
Performance and Expenses

Attributes and Holdings

Management

More Info

### Top Ten Countries - 9/30/13



As a percentage of total equity holdings

### Top Ten Industries - 9/30/13



Thornburg Allocation Map (Page Truncated Below)

### Closing Thoughts on Thornburg Investment Management

Thornburg provides users with a serviceable public website. The homepage is a distinct weak point, boasting a dated visual design that does not immediately engage visitors' attention. However, the site content makes up for the homepage's shortcomings. The firm's fund profiles deliver a clear and detailed overview of the Thornburg product line and the solid commentaries provide more added value. In sum, Thornburg's website offers enough quality content to satisfy investors' needs with few frills or added complications.

# USER-FRIENDLY HOMEPAGE DESIGN

## FIRST EAGLE INVESTMENT MANAGEMENT

[First Eagle Investment Management](#) can trace its history back to 1800's Berlin, where it joined a budding financial industry to catalyze early Germany's industrial development. The firm moved its operations to the United States in 1937, headquartered in New York City, and now manages around \$81 billion.

### Homepage

The firm announced in September that it would launch a newly revamped site within the following month, and the new site, launched in October, fully delivers on that promise. First Eagle's updated homepage offers a clean and highly functional design. The homepage body features a short recap of the firm's history and ownership model, as well as four columns exploring fund performance, promoting recent First Eagle press, listing recent commentaries and offering a link to the firm's private site. First Eagle's homepage is a beautiful example of successful design because it prioritizes content and user access while also being attractive and modern, whereas other firms might simply offer a nice design with no account for functionality.

**Performance** [View All](#)  
as of 10/29/2013

FUND	PRICES	CHANGES	YTD %
GLOBAL	55.17	0.03	13.54
OVERSEAS	24.40	-0.01	10.81
U.S. VALUE	20.44	0.02	14.32
GOLD	17.44	-0.36	-36.28
GLOBAL INCOME BUILDER	11.29	0.01	11.09
HIGH YIELD	10.11	0.01	5.42
FUND OF AMERICA*	34.72	0.18	22.86

Year to date (YTD) total return is as of the previous business day without reflecting applicable sales charges for Class A Shares or CDSC fee for Class C Shares. YTD figures are not annualized.

\*As of September 1, 2005, Class Y Shares are closed to new accounts. Inception date for I Shares is 03/08/2013.

**News** [View All](#)

Matthew McLennan on Consuelo Mack | [WealthTrack](#)  
Sep 27, 2013

Barron's | Cautiously Raking in Great Returns  
Sep 17, 2013

Abhay Deshpande on Bloomberg TV  
Sep 09, 2013

**Insights** [View All](#)

First Eagle High Yield Fund Quarterly Commentary  
Sep 30, 2013

First Eagle Global Fund Quarterly Commentary  
Sep 30, 2013

First Eagle Overseas Fund Quarterly Commentary  
Sep 30, 2013

Barron's | Cautiously Raking in Great Returns  
Sep 17, 2013

Volatility Can Create Opportunity  
Jul 01, 2013

The Most Common Current Gold Market Myth  
Jun 25, 2013

**Account Access**

Manage your account  
See statements & balances  
[Login](#)

**Spotlight**

First Eagle Global Fund Quarterly Commentary  
Sep 30, 2013

Looking back on the quarter, investors might be cheered by the strong market performance. But with the fifth anniversary of the financial crisis upon us, we think it is important to recall the financial fault lines that we monitor globally which keep us from feeling complacent.

First Eagle Homepage (Footer Truncated)

## Fund Profiles

First Eagle's fund profiles are relatively strong compared to the competition as they leverage the site's new design complexity to offer a high quality fund research experience. The profile pages feature performance graphs, pie charts and various other tables and graphics, and almost every element includes mouse-over callout boxes or pop-up windows offering additional information. Some data can also be viewed as a table or as a chart by toggling between the two options.

## Closing Thoughts on First Eagle Investment Management

First Eagle's newly redesigned site is a great value add for the firm, certainly deserving of more coverage than this limited study can afford. In addition to the strong homepage design and fund profiles, each making full use of the site's new visual capabilities, the remaining site content is appropriately engaging and informative. Considering these strengths as well as its adequate mobile performance, First Eagle ranks among the best websites reviewed in the *Around the Industry* series.

## PIONEER INVESTMENTS

Founded in 1928, [Pioneer Investment Management](#) is one of the oldest mutual fund providers in the United States, and one of the first American firms to invest overseas. The firm's flagship [Pioneer Fund](#) is an early example of socially responsible investing, striving to avoid companies that sell tobacco or alcohol as their main products. Today the firm is a subsidiary of Italy's UniCredit Group and manages \$211 billion around the world. The firm offers websites for individual and institutional investors as well as financial advisors.

### Homepage

Pioneer's Investor homepage is conventional but effective, sporting a clean and direct design that empowers the user to find whatever site content they may need. The body of homepage focuses on four distinct columns of information. From left to right, the first column offers a link for investor login and account access and provides a number of quick links to commonly used site content, such as the site's tax center or recent newsletters.

The second column presents the firm's most recent commentaries, the third lists new notices and press releases and the final column contains smaller promotional images and a series of "Classic Concepts" documents, such as [The Power of Buying Low](#). The homepage's main strength is that it makes no attempt to overcomplicate its presentation; everything is well organized and in plain view. In keeping with this approach, the page features a single fixed banner image that contains three rotating headlines, whereas most other firms include multiple rotating images with one headline each.

Pioneer Homepage (Footer Truncated)

## Fund Profiles

Pioneer's fund profiles include many common elements, dividing content across five tabs for Overview, Performance and Risk, Holds, Distributions and Literature. They are informative and include helpful items such as hypothetical growth charts and return tables but, visually, the fund profiles are relatively bland.

## Commentaries

Pioneer's regular [Perspectives & Viewpoints](#) commentaries are presented in an unlabeled list – a very inefficient method of organization that only confounds users' efforts to find a given piece. Considering that Pioneer's site is one of the few that lacks a general search function, a higher degree of organization in the commentary pages would greatly enhance the user experience.

## Closing Thoughts on Pioneer Investments

Pioneer's utilitarian approach to its website succeeds in some areas and falls short in others. The homepage is particularly strong thanks to its orderly visual restraint and the easy access it provides to key site content. The fund profiles are just average and the site's commentary presentation and organization is weak. Furthermore, the lack of general search functionality is particularly troubling because it impedes site navigation and overall usability. Like many other sites, Pioneer's public website is strongest at the front end and becomes gradually less so as the user ventures further from the homepage.

# COMPELLING COMMENTARY & THOUGHT LEADERSHIP

## ARIEL INVESTMENTS

[Ariel Investments](#) defines its niche by dealing exclusively in long-term, value-oriented investments and positions its small size (83 employees) and product line (14 funds) as a more personable investment experience. Reflecting its size and approach, the firm manages approximately \$5 billion in assets and its website features numerous visual references to *The Tortoise and the Hair*, including the firm's adopted motto, "Slow and steady wins the race." The firm actually redesigned its website since our initial review in July, though the changes are mostly visual in nature.

### Homepage

Ariel's newly revamped homepage places a greater emphasis on the firm's thought leaders, in keeping with the firm's overall strengths. A central image display promotes a selection of recent media appearances by Ariel staff, and two smaller static images just beneath promote recent content from Ariel President Mellody Hobson and Vice President Khoa Ho. The bottom of the homepage features a newly added performance and returns table for the firm's most popular funds.



Thought Leadership Promotion on Homepage; Mellody Hobson's Video Tips

### Fund Profiles

Effectively unchanged since the site revamp, the firm's fund profiles are spread across six sections, providing information on fund investment philosophy and processes, performance, fund characteristics such as sector weight and holdings, as well as fund commentaries. The information provided in the fund profiles combines to present a detailed picture of the fund at hand, but the heavy text presentation and lack of charts or graphics places Ariel's profiles slightly behind the industry curve.

## Commentary and Thought Leadership

Ariel Investments stands out in the degree to which it promotes its personnel as thought leaders, both on the website itself and in outside media. President Mellody Hobson and CEO/CIO John W. Rogers are regular fixtures on ABC, CNBC, and Bloomberg programs, as well as in *The Wall Street Journal* and *Black Enterprise*, among other publications. The site's [Financial Tips](#) tab regularly compiles Hobson's media appearances in sections like [Mellody's Mail](#), [Video Tips](#) and the [Tom Joyner Radio Show](#). Although Hobson is clearly the firm's standout thought leader, Ariel's site gives voice to many different key personnel.

## Closing Thoughts on Ariel Investments

Ariel Investments presents an interesting case study in the asset management landscape. Its commitment to being an industry thought leader garners the firm a much greater degree of exposure than its small size and value-oriented niche would otherwise attract. While the firm's website has its drawbacks – such as weak fund profile pages – the majority of the site makes a distinctly positive and definitely personable impression.

## MATTHEWS ASIA FUNDS

Matthews International Capital Management was founded in 1991 with a singular focus on investing in the burgeoning Asian markets of the time. Since then, the firm has become more casually known as [Matthews Asia Funds](#) and manages around \$23.8 billion in Asian and Australian markets. This article will review the firm's public investor site, which presents itself as a great resource for learning about Asian economies and market conditions, in addition to other standout qualities.

### Homepage

Matthews' homepage has a fairly traditional appearance. It features a set of scrolling banner images promoting the firm's latest commentaries and special features. Below these, the page includes four columns that showcase the firm's latest [Asia Insight](#) and [AsiaNow](#) thought leadership series in addition to new press releases and shareholder updates. This kind of homepage is common to many sites in the industry, but Matthews' stands out on the strength of its vibrant Asian-themed artwork, which sells the firm's niche position and gives the site a unique look.

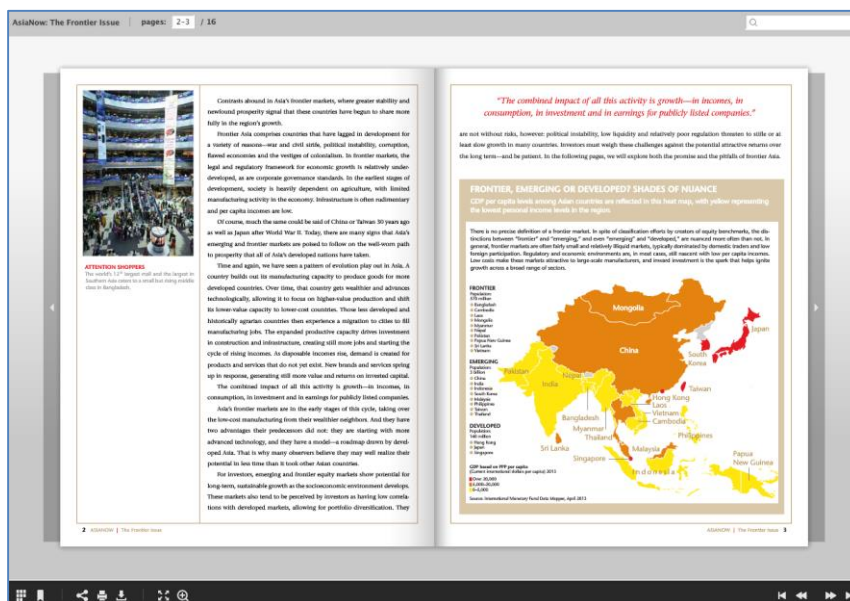
### Fund Profiles

The firm's fund profiles are quite good. In keeping with the firm's Asian niche, each fund profile features a map of Asia and Australia that quickly identifies all the countries in which the fund invests – a very interesting feature also employed by Thornburg. The profiles also include high-quality performance data – such as quarterly and monthly data and a hypothetical growth chart – that employs smart animation and visual design to give the data certain vibrancy not found on many other sites.

### Commentaries

As mentioned before, Matthews Asia positions its site as a key resource for education and research about Asian markets, economics and politics. This focus really pays off in the firm's excellent commentary and thought leadership offerings. The firm maintains a number of regular commentary series, each covering different topics within the broader Asian economic landscape. The flagship [Asia Insight](#) series chooses a single topic for more detailed exploration. For example, this month's focus is on Asian labor market

conditions, while last month explored the future of Japanese fiscal policy. [AsiaNow](#) is a more expansive but less frequent feature that focuses on the region's most pressing economic and political issues. The current [Frontier Issue](#) is available as an e-book, a rare and feature-rich format offered by only a few firms in our regular *Mutual Fund Monitor* and *Advisor Monitor* coverage. The firm also produces [Asia Weekly](#) and [Asia Market Performance](#), which are its most frequent and topical, but less in-depth, publications.



AsiaNow: The Frontier Edition e-Book

## Closing Thoughts on Matthews Asia Funds

Matthews Asia Funds occupies a very interesting niche in the investment landscape, which is a trait shared by plenty of other firms profiled in the *Around the Industry* series. However, none of the other firms express and own their given areas of expertise to quite the same degree that Matthews does. The firm's excellent commentary resources are the obvious standout here, but the rest of the site – notably the quality fund profiles and homepage – are also strong, making for a generally excellent website.

# INNOVATIVE WEB DESIGN & USABILITY

## DELAWARE INVESTMENTS

[Delaware Investments](#) was founded in 1929 and acquired by Australia's Macquarie Group in 2010. Currently, the firm manages \$179 billion and employs 137 investment professionals. Our favorite aspect of the firm's public site is its responsive design, a rare feature across financial services but seemingly more prevalent amongst asset management firms. Royce Funds' new site offers a leading example of responsive design, but Delaware Investments does a good job in its own right, offering four possible page layouts that adapt to different browser sizes.

### Homepage

Delaware's Individual Investor site homepage features a number of elements typical to many firms. The site includes a scrolling banner image that promotes new commentaries and different investment products. The homepage body is divided into different columns (depending on the responsive layout) that highlight new press releases and commentaries, and provide links to account access. These are fairly standard homepage features, but they are well-executed by the firm.

The screenshot displays the Delaware Investments homepage with a dark blue header containing navigation links: macquarie.com, Financial advisors, Individual investors, Institutional investors, About Macquarie, International sites, Search Delaware, and Search. The main content area features a yellow geometric graphic on the left and the Delaware Investments logo on the right. A navigation bar includes Home, Products, Performance, Literature, Account information, and About us. A central video player titled "Smart investing" with the subtitle "The process is our star" is featured, with a "Watch the video" button. Below the video are three yellow buttons: "Smart investing", "Stocks: What lies ahead", and "Fixed income". The page is divided into three columns: "Commentaries" with two articles by Scott Hastings and David Hillmeyer, "Smart investing" with a quote and a "Read Q&A" button, and "Delaware news" with three recent news items and a "More news" button. At the bottom, there are "Account access login" and "More commentaries" buttons.

Delaware Investments Homepage



## Fund Profiles

Delaware Investments fund profiles are visually distinct and informative, divided into six tabs: Overview, Performance, Portfolio, Management, Fees and Expenses and Commentary. Regardless of the current tab selected, a right-side column summarizes the fund's vital details on all pages. These include its Morningstar Rating, Lipper Rankings and pricing information, as well as a drop-down menu for navigating to other funds. However, Delaware's fund profiles do not include performance charts or graphics, such as the hypothetical growth illustration that so many other firms offer.

## Responsive Design

As mentioned above, Delaware's site offers four different page layouts depending on the size of the user's browser. Desktop browsers will naturally accommodate the largest layouts, and tablet screens (we used an iPad 2) will display the second smallest and second largest formats. The very smallest option is reserved for mobile phone screens, and in this case Delaware's site leaves something to be desired here. The small responsive layout relies very heavily on text and features few images and generally looks old-fashioned. This contrasts with other firms' responsive layouts – particularly those of Royce Funds – retain the site's overall look and design even on the smallest displays. Aside from this shortcoming, the site's responsive qualities are excellent.

## Closing Thoughts on Delaware Investments

Delaware Investments does a lot of things right with its Investor website, such as its ease of navigation, visual design and quality of information. However, there are certain things the firm could do to enhance the site even more, such as adding performance graphics to its fund profiles and improving the quality of its smallest responsive display. Overall, Delaware's site is a strong online asset management platform that reinforces the importance and value of responsive design.

## ROYCE FUNDS

The [Royce Funds](#) has been a leader in small- and micro-cap investing for more than 40 years. Reflecting this approach, the firm has over 100 employees and approximately \$36 billion in assets, making it one of the smaller firms covered in this series. However, the firm's website makes an outsized impact, adopting a design philosophy and visual personality completely distinct from any other firm we've reviewed. For example, on a technical level, the site is one of the few we've seen that employs responsive web design. Visually, the site often includes illustrations alongside more traditional images, which gives the site a unique and friendly aesthetic.

## Homepage

The Royce Funds website most directly resembles a modern blog template, using a clean white background, sharp text and visuals, and a long vertical layout. The homepage highlights the latest commentaries and news in its main column, followed by excerpts from the [About Royce](#) and [Our People](#) sections. The thinner right-hand column features links to more technical site content, such as fund commentaries, tools and featured fund profiles. The homepage also offers personalization options, allowing site visitors (even prospects) to choose funds they want to follow after they register for the site. The site's responsive design allows site content to properly display across different screen sizes. This makes Royce's public website a versatile asset management platform that works well on both desktops and mobile devices.



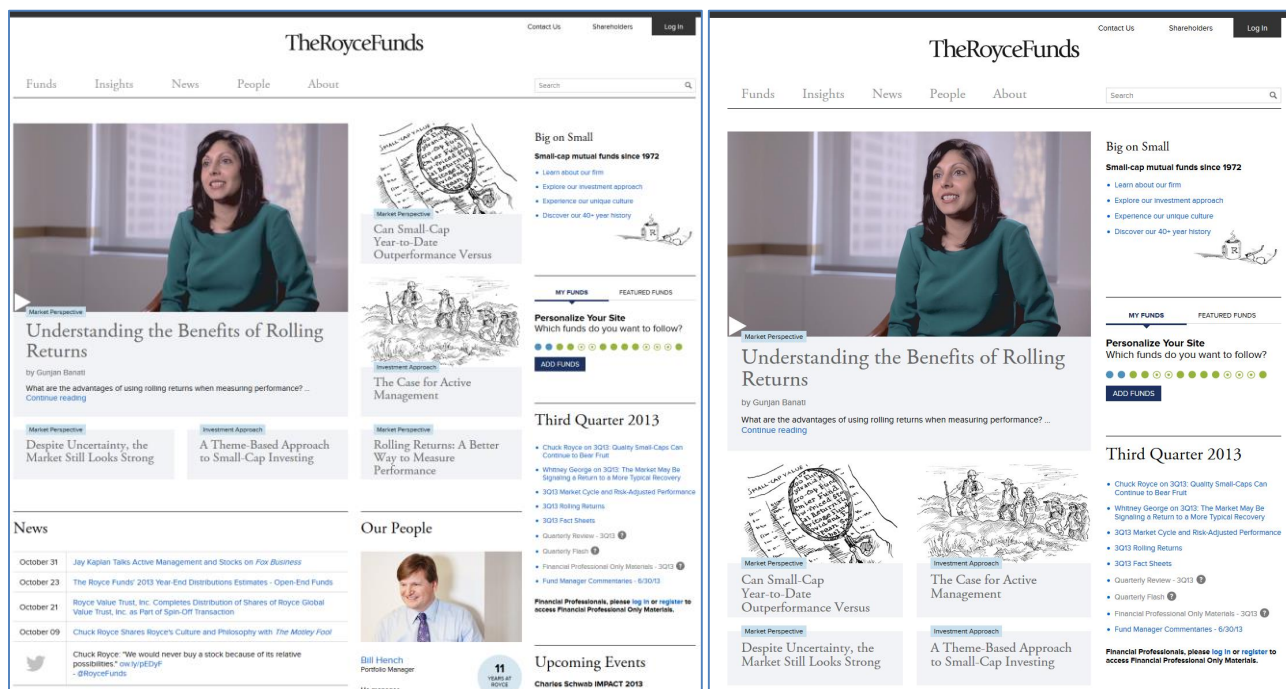
**Closing Thoughts on Royce Funds**

Royce Funds' public website is a major standout in the online asset management landscape. No firm we have seen, either inside or outside of our regular *Mutual Fund Monitor* coverage, makes quite the same impact with their website. Royce Fund's site is very well designed, especially considering its responsive properties, and its unique visual personality that shines through in every site area. We are excited to see if other firms adopt similar designs, but for now, Royce Funds' public website is one of the best covered in this whitepaper.

# THREE KEY TAKEAWAYS

## RESPONSIVE DESIGN IS THE FUTURE OF WEB DESIGN

Two firms in this *Around the Asset Management Industry* whitepaper – Royce Funds and Delaware Investments – employ responsive web design to optimize their sites for any screen or device. Consider the example below, in which the content on Royce’s homepage realigns and resizes as the browser window becomes narrower. Royce’s site accommodates five different responsive layouts; Delaware provides four.

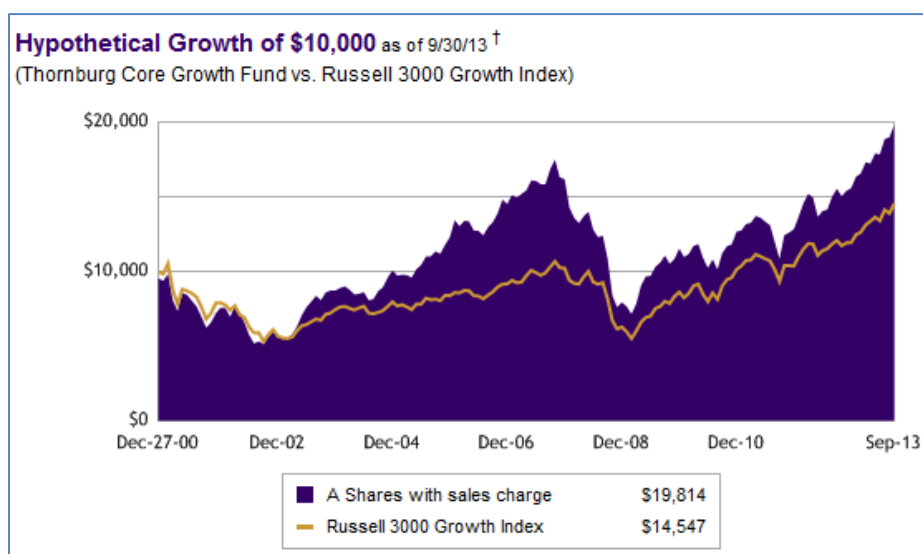


**Royce Funds: Largest and Second-Largest Page Layouts**

Responsive web design is quickly becoming more common in general, so it is good to see that the asset management industry can stay current. In fact, CI’s research has observed that responsive design is actually more prevalent amongst asset management websites than in other sectors like brokerages, banking or credit cards. We hope that more asset management firms – including those within our regular *Mutual Fund Monitor* coverage and those outside of it – will continue to adopt leading designs for their websites and break new ground in the online financial marketplace.

## STRONG FUND PROFILES ARE IMPORTANT TO THE USER

Investors visiting an asset management website are often looking to research the firm's fund offerings. Firms that provide engaging fund profiles that also deliver quality content are sure to attract more investors, and, hopefully, help them to make better investment decisions. The best fund profiles universally feature helpful charts and graphs such as the Hypothetical Growth of \$10,000 chart, which illustrates historical fund performance alongside an index benchmark. Thornburg's chart, featured below, is a typical example. Most of the firms reviewed here offer profiles that range from good to excellent, with only a few firms falling short of the industry standard.



**Thornburg: Hypothetical Growth Chart**

## COMMENTARIES AND THOUGHT LEADERSHIP SELL A FIRM'S BRAND

The extent to which an asset management firm focuses on its commentary content is largely dependent on its brand's message and how the firm wishes to promote it. Firms like Matthews Asia and Ariel Investments are standout examples of niche firms that focus on producing excellent commentary resources and promoting their firm's unique thought leadership in order to further distinguish themselves in a very diverse and competitive field. While the quantity and quality of commentary content is obviously important, so is the organization and promotion of that content within the site. Weak execution in this area can obscure a firm's commentaries or reduce their effectiveness to the user. For example, Calvert has a very distinct brand focused on socially responsible investing, but poor organization of its commentaries and minimal promotion for its thought leadership materials in that area make its brand less obvious.

## OUR ASSET MANAGEMENT MONITOR SERVICES

Corporate Insight's *Monitor Research Services* continuously track the online and offline user experience offered by leading firms across the financial services industry. For asset management firms, we offer our *Advisor Monitor* and *Mutual Fund Monitor* research services which collectively track the public, client and financial advisor websites and collateral materials offered by leaders in the space.

### ADVISOR MONITOR

Launched in 2002, ***Advisor Monitor*** was Corporate Insight's first subscription Monitor Service to track and review the online user experience from the perspective of financial advisors. Using live accounts from active financial advisors, *Advisor Monitor* gives you an unprecedented look at the online advisor resources offered by your competitors across the asset management industry. These include sales and marketing materials, practice management resources, product and educational resources and more.

### FIRMS COVERED

- AllianceBernstein
- Allianz
- American Century
- American Funds
- BlackRock
- DWS Investments
- Eaton Vance
- Federated
- Fidelity
- Franklin Templeton
- Invesco
- iShares
- J.P. Morgan
- Lord Abbett
- MFS
- Oppenheimer
- PIMCO
- Putnam
- The Hartford

### SUBSCRIPTION HIGHLIGHTS

**Monthly Research Reports** – Comprehensive reports that focus on key aspects of the online advisor experience including product and educational resources, sales and marketing materials, practice management resources and more. Also available as an easily digestible slide deck. Reports include:

- Detailed reviews of each *Advisor Monitor* firm
- Key findings and best practice analysis to help improve your company's offerings
- Handy matrix summarizing your competitors' offerings

**Bi-Weekly Update Reports** – In-depth review of latest changes and additions to competitor advisor sites.

**Advisor Website Videos** – Go behind-the-login and take a first-hand look at the online resources your competitors offer their advisors.

**Advisor Collateral Materials** – All materials and communications that we receive are available for subscribers to view or download online. This includes sales materials, newsletters, marketing pieces, disclosure documents and email communications.

**Analyst Support** – Personalized research support from our experienced *Advisor Monitor* team.

## MUTUAL FUND MONITOR

Launched in 1999, *Mutual Fund Monitor* focuses on the online user experience offered to clients and prospective investors by asset management firms. Using live accounts, *Mutual Fund Monitor* gives you a first-hand look at online capabilities including client account information, transactions, educational tools and account documents offered by your competitors across the asset management industry.

### FIRMS COVERED

- AllianceBernstein
- American Century
- American Funds
- Dreyfus
- Fidelity
- Franklin Templeton
- ING Funds
- Invesco
- Janus
- Legg Mason
- MFS
- OppenheimerFunds
- Putnam
- RS Investments
- T. Rowe Price
- Vanguard
- Wells Fargo

### SUBSCRIPTION HIGHLIGHTS

**Monthly Research Reports** – In-depth reports that focus on key aspects of the online customer user experience, account documents, customer service, industry trends and more. Also available as an easily digestible slide deck. Reports include:

- Detailed reviews of each *Mutual Fund Monitor* firm
- Key findings and best practice analysis to help improve your company's offerings
- Handy matrix summarizing your competitors' offerings

**Bi-Weekly Update Reports** – Review of latest changes and additions to competitor public and client sites.

**Client Website Videos** – Go behind-the-login and take a first-hand look at the online resources your competitors offer their clients.

**Client Collateral Materials** – All materials and communications that we receive are available for subscribers to view or download online. This includes account statements, newsletters, marketing pieces, disclosure documents and email communications.

**Analyst Support** – Personalized research support from our experienced *Mutual Fund Monitor* team.



To learn more about our *Advisor Monitor* and *Mutual Fund Monitor* research services, please contact **Jeff Latzer**, head of asset management research, at 646-751-6965 or [jlatzer@corporateinsight.com](mailto:jlatzer@corporateinsight.com).

## CORPORATE INSIGHT THOUGHT LEADERSHIP



### [Next-Generation Investing: Financial Startups and the Future of Financial Advice](#)

CI tracks over 100 startups that cover a wide range of new ideas across financial advice and investing. The study, which is out now, focuses on each idea, compares them to what established financial institutions offer and examines the potential impact on the industry. Download the study preview featuring excerpts now!



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The study examines the tablet-friendly website features provided by four leading firms across financial services and provides recommendations for financial services firms building tablet-optimized websites.



### [Alternative Investments: How Asset Management Firms Frame Their Funds](#)

This whitepaper examines the online content leading firms are using to educate investors and financial advisors about alternative investments and takes a look ahead to what's next for these products.



### [Senior Citizens and Mobile Finance: Design and Support Solutions to Empower the Senior Set](#)

Using CI's user-testing expertise and ongoing mobile finance research, this slide deck highlights specific areas where seniors may struggle with financial services apps and offers design and support solutions that will give this valuable audience the comfort and confidence to engage in mobile finance.



### [2013 Mobile Finance Trends and Innovations](#)

This study includes commentary on mobile developments, key takeaways for financial services firms and thoughts on what's next for mobile finance.



### [Asset Management and Social Media: A Guide to Social Marketing](#)

This guide looks at how asset management firms use popular social media platforms such as LinkedIn, Twitter, Facebook, YouTube and Google+ to connect directly with investors and financial advisors. It's also available as a [slide deck](#).

