

Survey Design

Interviewed Organisations

20 Wealth Managers, Private Banks & Banks
9 Unit Linked
20 Fund-of-Funds
49 All Organisations

Response Rate

All Organisations represent 82 per cent of Universe

Interviewees

Head of Fund Distribution, Head of Product Selection, Analysts, Portfolio Managers, Head of Sales, Head of Business Support

Method

Telephone interviews by TNS Sifo Prospera's interviewers

Time Period

November 6th – December 3rd, 2012

Overall Performance Top 10

All Organisations	Rank	Mean Value		Portion of Clients	
					%
	1	4,06	Alfred Berg		31
	2	4,02	Handelsbanken		54
	3	3,94	Schroders		48
	4	3,93	Franklin Templeton		63
	5	3,92	Fidelity Worldwide Investment		67
	6	3,88	J.P. Morgan Asset Management		67
	*7	3,85	Öhman		44
	*7	3,85	Danske Capital		40
	9	3,83	SKAGEN Fonder		50
	*10	3,82	BlackRock		75
	*10	3,82	Lannebo Fonder		56
Wealth Managers & Unit Linked					
	1	4,12	Alfred Berg		43
	2	4,03	Fidelity Worldwide Investment		82
	3	3,96	Schroders		64
	*4	3,91	BlackRock		86
	*4	3,91	J.P. Morgan Asset Management		79
	*4	3,91	Franklin Templeton		64
	7	3,86	SKAGEN Fonder		54
	8	3,84	Handelsbanken		50
	9	3,83	Lannebo Fonder		64
	*10	3,78	Goldman Sachs		46
	*10	3,78	Danske Capital		36