

PRIME SERVICES

# Cap IntroGraphics - Summer 2021

## Interest in Alternative Investments

Pershing's Capital Introductions team meets with private wealth and institutional investors across the U.S. to gain insights on investment strategies in the current marketplace. The Cap IntroGraphic below highlights professional investors' interest in specific strategies and their preferences in fund attributes.<sup>1</sup>

### Strategy Popularity



#### HIGHEST DEMAND IN EQUITIES Long/Short Equity Sector

Diversified Healthcare and Biotech specialists are the most popular, followed by TMT



#### HIGHEST DEMAND IN CREDIT Multi-strategies and Long/Short Corporate Credit

### Minimum Net Returns



2021  
most investors require  
**10-15.99%**

FALL 2020  
most investors required  
**8-9.99%**

### Investor Areas of Concern



INFLATION RISK

&



INTEREST RATES

### Increased Investor Interest



MUNICIPAL STRATEGIES

&



INFRASTRUCTURE EQUITY



## Adventures in Capital Raising: Allocating in a Virtual World

While the alternative investments industry continues to evolve, one thing remains the same: the need for capital. Managers and allocators shifted to a remote work environment and found new ways to interact and grow their businesses. Now, more than a year into the pandemic, they're applying and adapting lessons learned as they continue to shape their capital raising strategies.

[CLICK HERE](#) for a replay of our recent webcast, featuring a panel of investors and managers sharing best practices and perspectives on fundraising in 2021.

# Are you interested in learning more about allocator perspectives and expanding your investor network?

Pershing's Capital Introductions team can help with:

## INVESTOR INTRODUCTIONS

- Receive quality introductions to professional investors based on investor preferences for investment strategies, thoughts on risk/return and volatility targets, and preferences around AUM and track records

## PULSE OF THE MARKET

- Access color on the latest alternative investing topics via our *Cap IntroGraphics* and investor "Flash Poll" results
- Hear about investor views on new product launches

## EVENTS

- Attend forums, roundtables, and webinars featuring investors sharing perspectives on alternative investment trends
- Connect with alternative managers and professional investors at exclusive networking events across the U.S.

## Other Opportunities at Pershing

As the wealth management industry's largest provider of clearing and settlement solutions, Pershing provides investment managers with:

### VISIBILITY & CLEARING OPPORTUNITIES

- Participate in INSITE, Pershing's premiere financial solutions conference for advisor professionals, through speaking or sponsorship opportunities
- Engage with the financial advisory community through Pershing's RIA Symposiums
- Make your fund available for transaction processing to Pershing's wealth management clients via our custody platform, Alternative Investment Center

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## Contact us

Interested in learning more? Contact our Prime Services' Capital Introductions team:

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<sup>1</sup>Data reflects investor openness to looking at investment strategies (not necessarily immediate, actionable demand or changes in demand) and shows aggregate interest in a particular strategy of those investors that provided information. Investors canvassed may or may not be current investors of funds that are direct clients of Pershing LLC.

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