

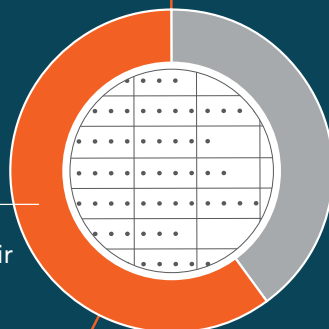
Asset Allocation Technology Survey

Findings and Conclusions

Milestone Group surveyed assets owners and investment managers globally. Here are a few representative findings.

USAGE OF SPREADSHEETS IS RAMPANT

60% of asset allocators rely on **spreadsheets** in their investment processes



COMPLEXITY CONTINUES TO RISE

82% of asset allocators report that investment strategies are becoming **“more”** or **“much more”** complex

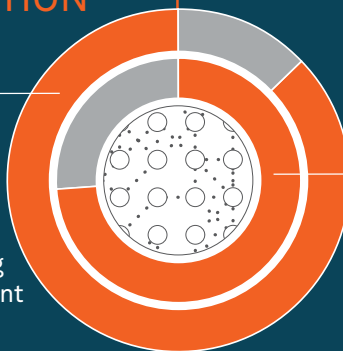
73% of asset allocators believe that portfolio implementation is becoming **“more”** or **“much more”** complex



TECHNOLOGY IS IMPORTANT BUT ITS IMPLEMENTATION IS FRAGMENTED

87% of asset allocators declared that technology is **“critically”** or **“very important”** when implementing advanced investment strategies

74% of asset allocators require **better technology** to manage and rebalance their portfolios



For the full survey report visit milestonegroup.com/AATSurveyReport

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