

Living Ratings

The brand and digital intelligence of
the world's leading asset managers 2024

BUILDING
BRAND

BUILDING
REPUTATION



Living 

RATED 1 INTELLIGENCE

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Want to know how your firm has scored across each of our key criteria? Please reach out to [Mark Stephenson](#) to arrange a meeting.

Living Ratings of Asset Managers 2024

Building Brand. Building Reputation.

New digital tools and data are transforming asset management marketing, yet the challenge of creating brands that genuinely connect with people remains.

In 2024, the sector has faced significant macro challenges, including geopolitical turbulence, ESG integration and technological disruption. Amid this environment, our research highlights a select group of firms excelling in brand and digital intelligence, while others strive to catch up.

In evaluating how well top asset management firms are building their brands and digital presence, this year's Ratings underscores both their progress and a critical opportunity: the need for brands to strengthen and differentiate in an increasingly competitive market.

Performance

Evolving expectations for how people discover and engage with digital experiences have sharpened our evaluation criteria yet again this year. We again excluded firms with insecure websites or limited online presence and placed greater emphasis on humanity, content generation and channel delivery. As a result, the Top 100 comprises firms that have an active digital presence, interacting and communicating with clients regularly, providing us with content to analyze.

The average score of the Top 100 was around 52% - 4% lower than last year, marking the lowest average since 2019. Only five firms earned the top-performing Determined category (2023: 7), while 40 firms in the Focused category represent a decline (2023: 46). The Energetic category grew to 13 firms (2023: 9), but 42 were rated Lackluster (2023: 38).

The Top 20 have distinguished themselves with intuitive user interfaces, high-quality content, clear navigation, comprehensive fund manager profiles and consistent branding. Firms outside this group are lagging.

Authenticity and humanity

Top firms increasingly leverage new platforms for content segmentation, targeted promotion and performance marketing. However, the gap between digital activity and genuine human connections remains.

LinkedIn continues to be the platform of choice for the Top 100, with 98% actively engaged, yet only 43% fully optimize its use. While more firms are establishing their presence on Instagram and YouTube, quality engagement on LinkedIn declined from 72% in 2023 to 59% this year. Only 44% of the CEOs of the Top 100 are active on LinkedIn, a 6% decrease, representing missed opportunities for connection.

Elevating fund manager profiles presents another opportunity to build trust and establish relationships with investors. Only 7% offer fund manager videos on their fund pages, and just 7% feature high-quality fund manager profiles (2023: 9%). Broadening video content, used by 78% of firms (a 38% increase), could boost transparency and trust.

People-centric content on LinkedIn rose from 16% two years ago to 80% in 2024, reflecting one shift toward human-centered marketing.

Brand, purpose and values

Despite fierce competition, many firms are not prioritizing brand differentiation on their websites, even though websites often serve as primary discovery points. Just 56% highlight their brand position on their homepage, a 7% decline from 2023. Fewer than half (46%) reference brand values on their websites, a 9% decrease. Only four in 10 firms incorporate distinctive visual language, a modest increase from 38% in 2023.

Content capabilities

Many firms struggle with high-quality content and user engagement tools. Only 7% of the Top 100 offer high-



Kate Shaw, Co-founder and Chief Executive Officer

quality search features, down from 10% in 2023. This leaves users navigating non-visual, non-filterable lists. Additionally, just 19% leverage data-driven tools, down from 24%. Just 11% offer high-quality fund and strategy pages, a decline from 17%.

Despite these challenges, content strategies are evolving. Along with more firms turning to videos, usage of blogs and other serial content has more than doubled, with 56% of firms adopting such formats, compared to 27% in 2023. This growth reflects a commitment to content innovation despite persistent challenges.

Opportunities ahead

This year's report offers a deeper dive into our findings, including perspectives on six key components asset managers should prioritize to build their brand and reputation, and our thoughts on the (brand) value of authenticity. I hope you find the report insightful. For questions or to discuss the findings, please [email me](#).

WE ARE
**VISION
ACHIEVERS**

CELEBRATING 20 YEARS

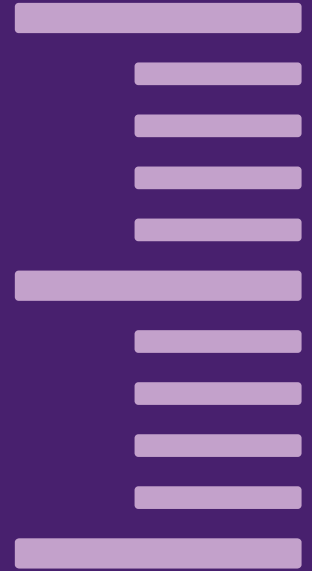
In a world of disruption, we help our clients
create a world of difference through research,
brand, digital and advertising.

www.living-group.com



Living 

HIGHLY RATED



About Ratings

Now in its 37th edition, Living Ratings benchmarks the brand and digital intelligence of the world's leading financial and professional services brands.

These studies provide our clients with evidence-based insight that continuously enhances their marketing communications and gives us unparalleled knowledge of our specialist sectors.

Digital diagnostic

In addition to our annual Ratings report, we offer an in-depth diagnostic of your brand, website and social media footprint, analyzing your digital intelligence and comparing your firm against your closest competitors.



Our analysis is the logical first step on the journey to improve your brand and digital intelligence, empowering you with objective evidence and a clear strategy.

Analysis

To analyze how your brand and digital footprint performs against a set of proven benchmarks.

Re-alignment

To re-align your brand and digital strategy to ensure that any future-generated content receives the maximum exposure with your target audience.

Connectivity

To connect your social media strategy with your brand and content strategy.

Purpose

To ensure that your CMS platform is the right fit for your purposes and goals.

Implementation

To enable you to implement enhancements and corrections in line with best practice.

UX

To improve the user experience and information architecture of your website.

Understanding

To understand what is required to create a better brand and digital experience for all your stakeholders – internal and external (and to gain a higher Ratings score in the next review).

WHO, WHAT, WHEN & HOW

Rating and classifying each firm

In July, August and September 2024, our analysts reviewed the brand and digital intelligence of the world's leading asset managers – source: ©IPE Top 500 Asset Managers published in June 2024. Each of the 100 firms was rated through the eyes of an intermediary and measured against 100+ criteria, including several new metrics covering engagement (website functionality and the social media channels used) and evidence (brand and content on website and social media).

How we calculate our scores

Each firm is allocated an overall percentage score. This is calculated by adding the scores for the individually weighted engagement and evidence criteria. We then use the separate engagement and evidence scores to classify each asset manager with one of four definitions of their digital presence – Determined, Energetic, Focused or Lackluster.

Sector averages are based on the full listing of the top 100 firms. The five firms with the highest scores are also reviewed with expanded case studies.

1 Website
functionality

2 Website
content

3 Social media
presence

4 Social media
content

PUSHING THE CRITERIA

Challenging the criteria

As technology marches forward, so do target audiences' expectations. Therefore, we continually adjust the weighting of our criteria as well as introducing new criteria, to match the needs of the respective audience.

For 2024, here are some of our core areas of analysis:

ENGAGEMENT

The search for search

Our quest continues to find the perfect search functionality and (pictorial) results. With the exception of a handful of firms, most still fail at this and serve up confusing experiences that are neither user-centric nor helpful in any shape or form. We recognize those who get it right.

Find me. Help me

Measuring SEO and accessibility, we also use the Ecograder tool that measures your website's carbon emissions. The Ecograder tool also calculates page loading speed and accessible user experience.

Two ways, not one way

We celebrate firms that go beyond delivering the standard level of interactivity that so many asset management websites offer. Online tools is a category where we reward firms that use their sites as a two-way platform to engage with their audiences through interactive data tools.

Marketing automation and personalization

With the advancement of AI tools and technology, we look for evidence of functionality deployed to deliver automation and personalization, including the use of Chatbots.

Pushing social to the max

One size does not fit all, so we take time to check the content types and topics posted by a firm across their social media channels. We reward firms that have a clear content strategy in place for each channel and carefully curate what's posted and where.

EVIDENCE

Brand and deliver

In an industry where most firms struggle to differentiate themselves from one another in any shape or form, we celebrate those who bring clarity and stand out with their brand positionings, brand values, tone of voice and messaging.

Visually appealing

Another underused tactic in the challenge to stand out from competitors is an asset manager's visual identity. Those firms who have invested in creating a successful brand code are well equipped for the marketing and communications challenges that lie ahead.

People still buy people

The need for human connection and intellectual capital is greater than ever. Your people are your brand so why do so many asset managers neglect to profile their fund managers and people? Presenting the human face and culture of a firm helps to build a differentiated brand.

Insightful content

This category scrutinizes insights landing pages and interactive thought leadership content. Firms who deliver a variety of content (audio, video, snapshots, outlooks) with search filters by content type as well as topic and themes, are rewarded.

About you, not us

We look at a firm's content on their website and across social media to see if it's addressing client-related issues and speaks to their target audiences. Many firms still fall into the trap of talking about themselves rather than what they can do for their clients.

THE (BRAND) VALUE OF AUTHENTICITY



No longer are we B2B, we're B2H... business to human. In fact, let's take it a step further. We're humans talking to other humans (at least for now).

In a market where firms struggle to differentiate – showing the human side of your organization isn't just a nice-to-have; it's a game changer. If you think about it – can a person feel truly connected to an organization if they feel like they are being spoken to from a PR script or by a robot?

Connect with words

Authenticity is the secret ingredient that transforms a company from a faceless entity to someone you can relate to or trusted advisor. When organizations ditch the corporate speak and opt for a genuine, conversational tone, it's like a breath of fresh air. People want to engage with real stories and real voices, not carefully curated corporate jargon.

Being human is about creating a connection. Imagine having a chat with a colleague over coffee and telling them that you've fostered a collaborative relationship with your neighbor and you're leveraging your synergies to repair the broken fence. Or what about that friend who just talks about themselves and what they're good at. It feels like they barely know you or care about you at all.

The same goes for businesses. When we sound real and authentic, we invite our audience into a more approachable, open conversation. We make them feel heard and understood and with that we start to earn their trust and build the connection.

"Living Ratings™: 46% of asset managers have brand values on their website"

Distinctiveness is the new differentiation

'Being human' isn't just about adopting a warm tone of voice and peppering your website with photos of smiling employees. Although these do help tell your story and bring your brand personality to life, what helps to shape a distinctive personality are your values – your North Star guiding every decision, action or day-to-day interaction.

Brand values form part of your firm's DNA – it's what your clients buy into along with your products and services. They are not there just to look good on the wall of your office or your website, they are there to sprinkle the magic on what you do, and for clients it means they can truly see what makes you different.

Embedding them across your organization means socializing and operationalizing your values and demonstrating to the world, even celebrating, how you've done it – proving that they live deep within your organization. That could be through client work – case studies that showcase your expertise and how your teams come together in a way that made it different or special for your clients – it's not just about 'what' you delivered for them, but 'how.'

"Living Ratings™: Only 56% of asset managers state their brand positioning upfront on their website home page."

How do the values live in your day-to-day work and the culture of the organization? How do you bring to life those stories in your careers pages? Can we hear it in the words of the people who work there through your more human social channels, like Instagram and TikTok? Is it time to let the humans take over again?

If your firm's personality isn't shining as bright as it should – we'd like to help it radiate. Contact [Mark Stephenson](#) to talk more – human to human.

ARE YOU DETERMINED OR NOT?

By analyzing the individual engagement and evidence scores, we have categorized each of the leading firms' digital intelligence into four areas.



Want to know how your firm has scored across each of our key criteria? Please reach out to [Mark Stephenson](#) to arrange a meeting.

ASSET MANAGERS RATINGS AND RANKINGS

● Determined
 ● Energetic
 ● Focused
 ● Lackluster

Living Ratings 2024 Ranking	Living Ratings 2023 Ranking	IPE 100, 2024	Firm name	Score / 1,300	%	Category
1 =	1	1	BlackRock	1050	80.77%	●
2 ↑	4	21	Nuveen	1026	78.92%	●
3 ↑	6	4	State Street Global Advisors	995	76.54%	●
4 ↓	2	90	Aviva Investors	993	76.38%	●
5 ↑	8	35	AllianceBernstein	987	75.92%	●
6 ↓	3	30	Schroders	979	75.31%	●
7 =	7	7	Capital Group	958	73.69%	●
8 ↓	5	80	Janus Henderson	955	73.46%	●
9 ↑	26	12	Invesco	908	69.85%	●
10 ↑	40	6	Goldman Sachs Asset Management	896	68.92%	●
11 ↑	17	15	Franklin Templeton	880	67.69%	●
12 ↑	35	92	Baillie Gifford & Co.	874	67.23%	●
13 ↓	10	116	American Century Investments	865	66.54%	●
14 ↑	32	31	Federated Hermes	852	65.54%	●
15 ↑	19	59	abrdn	836	64.31%	●
16 ↓	15	25	DWS Group	811	62.38%	●
17 ↑	49	17	T. Rowe Price	805	61.92%	●
18 ↓	10	20	Wellington Management	796	61.23%	●
19 ↓	14	137	Robeco	788	60.62%	●
20 ↑	43	54	Allspring Global Investments	787	60.54%	●
21 ↓	15	22	Northern Trust Asset Management	784	60.31%	●
22 ↑	50	39	Dimensional Fund Advisors	780	60.00%	●
23 ↑	45	24	Blackstone	777	59.77%	●
24 ↓	12	2	Vanguard Asset Management	770	59.23%	●
25 ↑	48	64	RBC Global Asset Management	769	59.15%	●
26 ↓	22	11	UBS Asset Management	761	58.54%	●
27 ↓	25	49	Allianz Global Investors	760	58.46%	●
28 ↑	56	85	Swiss Life Asset Managers	756	58.15%	●
29 =	29	38	New York Life Investments	755	58.08%	●
30 ↓	11	87	Russell Investments	752	57.85%	●
31 ↓	16	10	PIMCO	751	57.77%	●
32 ↑	41	41	Manulife Investment Management	749	57.62%	●
33 ↓	31	73	M&G Investments	748	57.54%	●
34 ↓	33	23	Charles Schwab Asset Management	743	57.15%	●
35 ↓	23	5	J.P. Morgan Asset Management	742	57.08%	●
36 ↓	13	43	Columbia Threadneedle Investments	741	57.00%	●
37 ↓	30	82	Voya Investment Management	736	56.62%	●
38 ↓	28	89	Vontobel	735	56.54%	●
39 ↑	60	62	TD Asset Management	731	56.23%	●
40 ↓	27	98	Pictet Asset Management	730	56.15%	●
41 ↓	38	14	Morgan Stanley Investment Management	725	55.77%	●
42 ↑	53	105	Eastspring Investments	717	55.15%	●
43 ↑	83	36	BNP Paribas Asset Management	715	55.00%	●
44 ↑	69	78	Aegon Asset Management	713	54.85%	●
45 ↓	20	48	MFS Investment Management	712	54.77%	●
46 ↑	71	96	Nordea Asset Management	709	54.54%	●
47 ↓	21	60	Neuberger Berman	698	53.69%	●
48 ↓	36	69	Mercer	693	53.31%	●
49 ↑	62	110	Guggenheim Investments	687	52.85%	●
50 ↑	57	9	BNY Investments	684	52.62%	●

● Determined
 ● Energetic
 ● Focused
 ● Lackluster

Living Ratings 2024 Ranking	Living Ratings 2023 Ranking	IPE 100. 2024	Firm name	Score / 1,300	%	Category
51 ↓	44	65	Carlyle Group	683	52.54%	●
52 ↑	76	74	Barings	678	52.15%	●
53 ↑	85	79	Loomis Sayles & Company	673	51.77%	●
54 ↑	61	28	PGIM Fixed Income	669	51.46%	●
55 ↑	74	81	Caisse de dépôt et placement du Québec	667	51.31%	●
56 —	N/A	136	Lord, Abbett & Co.	666	51.23%	●
57 ↑	73	37	HSBC Global Asset Management	665	51.15%	●
58 ↑	68	3	Fidelity Investments	661	50.85%	●
59 ↑	67	8	Amundi	650	50.00%	●
60 ↑	66	97	SLC Management	639	49.15%	●
61 ↓	55	68	Ares Management	637	49.00%	●
62 ↑	70	51	Kohlberg Kravis Roberts & Co.	627	48.23%	●
63 ↑	77	76	Dodge & Cox	625	48.08%	●
64 ↓	50	19	Natixis Investment Managers	620	47.69%	●
65 ↑	83	26	AXA Investment Managers	618	47.54%	●
66 ↑	86	13	Legal & General Investment Management	616	47.38%	●
67 ↑	79	88	Swisscanto by Zürcher Kantonalbank	607	46.69%	●
68 ↓	46	63	Ostrum Asset Management	606	46.62%	●
69 ↓	59	56	Union Investment	604	46.46%	●
70 ↓	54	42	Apollo Global Management	587	45.15%	●
71 ↑	89	61	Stifel	575	44.23%	●
72 ↑	82	53	Principal Global Investors	574	44.15%	●
73 ↑	78	47	MetLife Investment Management	572	44.00%	●
74 —	N/A	131	Mesirow	568	43.69%	●
75 =	75	66	Eurizon Asset Management	566	43.54%	●
76 ↓	58	133	Lazard Asset Management	565	43.46%	●
77 ↓	47	70	Fidelity International	563	43.31%	●
78 ↓	42	29	Insight Investment	558	42.92%	●
79 ↓	72	72	Western Asset Management Co.	558	42.92%	●
80 ↓	51	84	PGIM Investments	557	42.85%	●
81 ↑	91	75	MEAG	554	42.62%	●
82 —	N/A	134	Royal London Asset Management	552	42.46%	●
83 ↓	37	132	TCW Group	542	41.69%	●
84 ↑	88	46	Macquarie Asset Management	529	40.69%	●
85 —	N/A	123	TPG - Texas Pacific Group	528	40.62%	●
86 ↑	87	40	Affiliated Managers Group	521	40.08%	●
87 ↓	84	44	APG Asset Management	487	37.46%	●
88 ↑	92	27	Sumitomo Mitsui Trust Asset Management (SuMi Trust)	471	36.23%	●
89 ↓	81	50	Generali Asset Management	466	35.85%	●
90 =	90	45	MUFG Asset Management	451	34.69%	●
91 ↑	92	91	NISA Investment Advisors	445	34.23%	●
92 ↓	91	18	Geode Capital Management	439	33.77%	●
93 —	N/A	55	Asset Management One International	437	33.62%	●
94 ↓	63	34	Brookfield Asset Management	418	32.15%	●
95 ↓	80	109	Santander Asset Management	417	32.08%	●
96 ↑	100	95	Nissay Asset Management Co.	404	31.08%	●
97 —	N/A	120	Ofi Invest Asset Management	396	30.46%	●
98 ↓	95	117	Nikko Asset Management	366	28.15%	●
99 ↓	93	113	Mirae Asset Global Investments	340	26.15%	●
100 ↓	94	52	Nomura Asset Management Co.	307	23.62%	●

Note: Mellon and Dreyfus Cash Investment Strategies have been excluded from our analysis as BNY Investments was rated instead.

NYL Investors was excluded as New York Life Investments was rated instead.

A further 31 firms were excluded due to no website presence or site not secure.

FOLLOW #1 LEADERS

Engagement and Evidence: The leaders

Asset managers that take a determined approach to digital engagement have a relentless client focus. Their successful formula balances two key elements:

ENGAGEMENT

Determined asset managers recognize the potential of useful digital functionality backed by a client-focused channel strategy. They can then create appealing and relevant content in a variety of media including graphics, audio, animation and video that captivates, informs and motivates the target audience.

EVIDENCE

Determined asset managers promote a clear purpose. They offer the user informative brand-driven messaging, relevant subject matter and the kind of insight that shows a deep understanding of client issues and interests. This demonstrates the ability to help clients succeed.

ENGAGEMENT

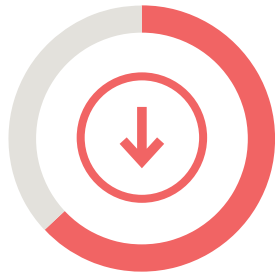
	Firm name	Engagement score (%)
1	State Street Global Advisors	82.31%
2	Capital Group	78.92%
3	Nuveen	78.62%
4	Franklin Templeton	77.69%
5	Aviva Investors	77.38%
6	BlackRock	73.85%
7	Invesco	72.00%
8	Schroders	71.38%
9	Allianz Global Investors	70.77%
10=	American Century Investments	69.23%
10=	Vanguard Asset Management	69.23%
10=	New York Life Investments	69.23%
13	PIMCO	68.62%
14	RBC Global Asset Management	68.31%
15	MFS Investment Management	68.00%
16	Lord, Abbett & Co.	67.85%
17=	T.Rowe Price	67.69%
17=	Natixis Investment Managers	67.69%
19=	Caisse de dépôt et placement du Québec	67.23%
19=	Swisscanto by Zürcher Kantonalbank	67.23%
21	Manulife Investment Management	66.77%

EVIDENCE

	Firm name	Evidence score (%)
1=	BlackRock	87.69%
1=	AllianceBernstein	87.69%
3	Janus Henderson	81.54%
4=	Nuveen	79.23%
4=	Schroders	79.23%
6	Goldman Sachs Asset Management	76.15%
7	Aviva Investors	75.38%
8	Federated Hermes	73.85%
9	Baillie Gifford & Co.	71.54%
10	State Street Global Advisors	70.77%
11	Capital Group	68.46%
12	Invesco	67.69%
13	American Century Investments	63.85%
14	abrdn	62.31%
15=	Wellington Management	61.54%
15=	Northern Trust Asset Management	61.54%
17=	Robeco	60.77%
17=	UBS Asset Management	60.77%
19=	DWS Group	60.00%
19=	Blackstone	60.00%
19=	M&G Investments	60.00%

THE NUMBERS THAT DEFINE ASSET MANAGERS: ENGAGEMENT

63%



of websites provide strong **information architecture (IA)**.
2023: 66%

23%



of websites deliver **intuitive user experiences (UX)**.
2023: 31%

19%



of websites have a **data-driven online tool**.
2023: 24%

50%



of websites provide **document library** for intermediaries.
2023: 48%

67%



of websites have **consistent related content**.
2023: 56%

70%



Use **marketing automation**.
2023: 8%

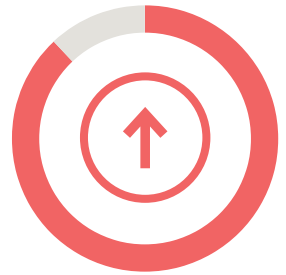
"Search continues to be a frustrating experience on most asset manager websites."

7%



have **high quality search functionality & results.**
2023: 10%

88%



is the **average web accessibility score across the sector.**
2023: 85%

43%



of asset managers are **fully optimizing LinkedIn.**
2023: 40%

47%



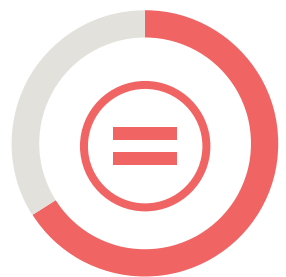
have an **active Instagram channel.**
2023: 34%

72%



have an **active Youtube channel.**
2023: 70%

66%



of firms employ **user profiling.**
2023: 66%

THE NUMBERS THAT DEFINE ASSET MANAGERS: EVIDENCE



of asset managers state their **brand positioning** upfront on their website home page.
2023: 63%



have **brand values** on their website.
2023: 55%



have **fund manager videos** on their fund pages.
2023: N/A



have **high quality fund manager profiles**.
2023: 9%



provide **quality fund and strategy** pages.
2023: 17%



of sites have a **distinctive visual language**.
2023: 38%

“Many of the firms at the top of our Ratings understand the importance of delivering content in a variety of formats.”

51%



of websites use **audio to deliver content**.
2023: 56%

78%



of websites use **video to deliver content**.
2023: 40%

56%



of websites **deliver content in blogs/series**.
2023: 27%

44%



of firm's **CEOs are active on LinkedIn**.
2023: 50%

59%



have **strong engagement** levels on **LinkedIn**.
2023: 72%

80%



profile **people content** on **LinkedIn**.
2023: 69%

1ST BlackRock

blackrock.com



- BlackRock
- Sector average

Classification:
▶ Determined



Once again, for the fourth consecutive year, our leader is BlackRock, and again the only firm to score above 80% this year.

With a very clear brand positioning, on the footer of every page of the site, and distinctive visual language (color, typography, iconography and imagery), the digital experience is exceptionally intuitive to navigate and design really does aid consumption of information.

The Advisor Center contains 'My Hub' which allows advisors to access premium content, such as portfolio tools and practice insights; all content that supports, educates and informs advisors. The Practice Management area contains Continuing Education courses, client engagement content, such as conversation starters, and even digital marketing advice.

From the Insights area you can select Insights Hub or Publications (which includes the monthly Advisor Outlook) and filter content by media types, topics and publications and authors.

BlackRock's social media content continues to impress, illustrating how to utilize social channels and demonstrating a clear social strategy. In summary, a story of excellence and consistency from top to bottom.

Images © BlackRock

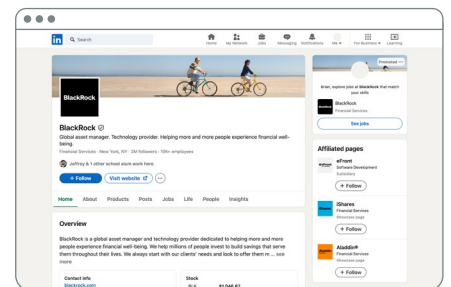
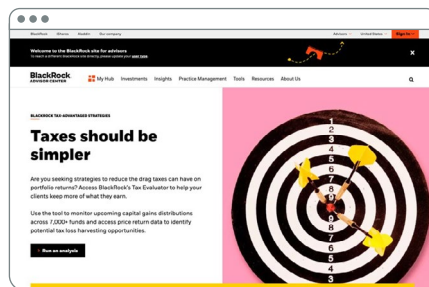
Key features

Engagement

- ▶ Market-leading user experience across the website
- ▶ Plethora of online tools keep intermediaries engaged
- ▶ Intuitive user experienced aimed at the advisor
- ▶ Exceptional use of social media channels.

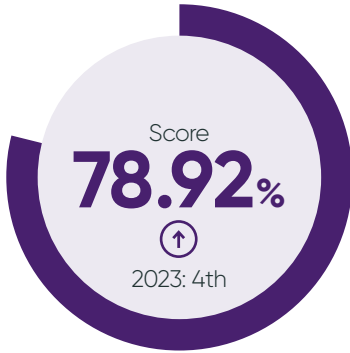
Evidence

- ▶ Brand positioning up front – clear about who they are, what they do, and why they matter
- ▶ Website content is enhanced by strong visual identity system
- ▶ Delivers useful and relevant educational content for intermediaries
- ▶ Cohesive social media strategy evident.



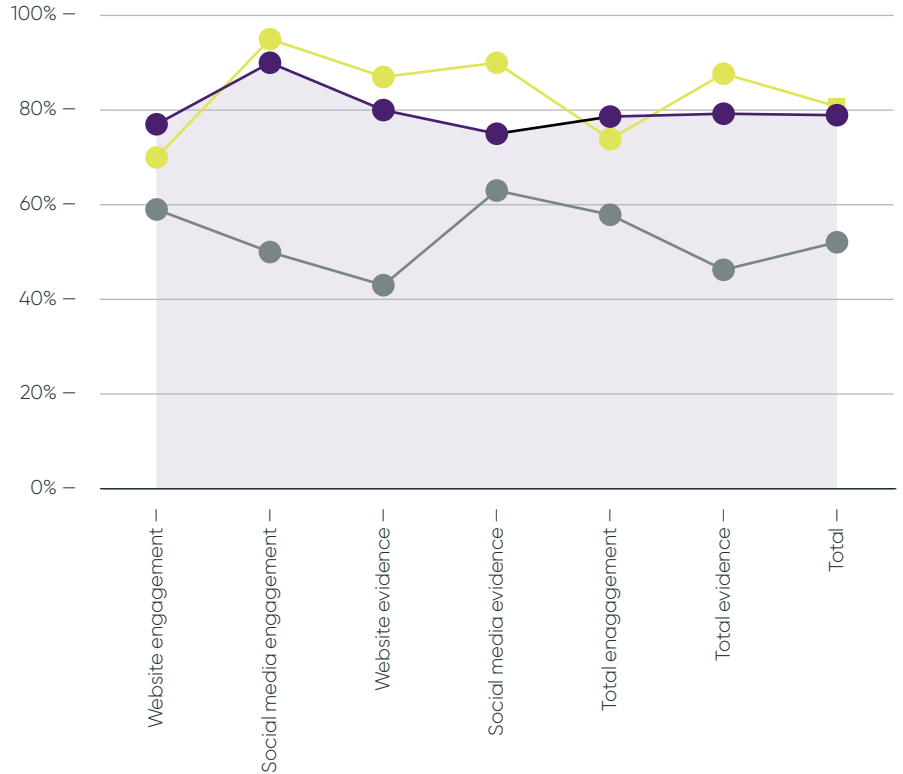
2ND Nuveen

nuveen.com



- Nuveen
- Sector leader
- Sector average

Classification:
▶ Determined



Maintaining their place in our Top 5 for the third-year running, is Nuveen.

The website is still one of the most impressive in the sector, embracing a combination of distinctive visual brand and engaging content.

Last year we reported that their main navigation is probably the most succinct you will find on any asset manager's website. With just three main items, Nuveen proves that this approach can provide a user journey that is both well-designed and intuitive.

The home page displays 'Featured products' and the site evidences personalization with "your recently viewed products," which highlights funds you've browsed. The majority of the fund pages contain related content and profile the fund manager, with a link to a full biography. There's even a Chatbot to assist you on the contact us page.

The brand journey is further enhanced with a selection of fund tools, enabling advisors to interact with Nuveen's content and data. With calls to action across the site, opportunities to subscribe for alerts and content, it's a well-curated website, supported by social media channels that continue the brand storytelling and journey.

Images © Nuveen

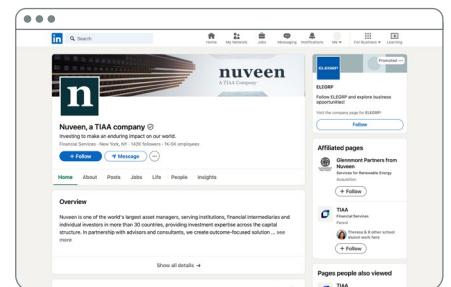
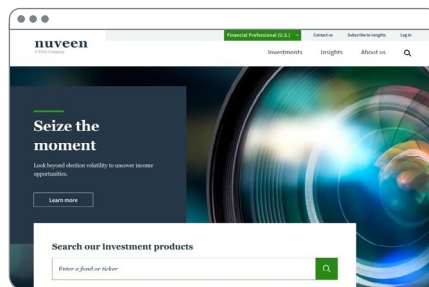
Key features

Engagement

- ▶ Sector-leading online tools
- ▶ Streamlined, concise navigation
- ▶ Carefully curated social media channels
- ▶ Excellent user experience.

Evidence

- ▶ Distinctive visual brand
- ▶ Use of video and related content on fund pages
- ▶ Extensive advisor education content
- ▶ Featured products and evidence of personalization.



3RD

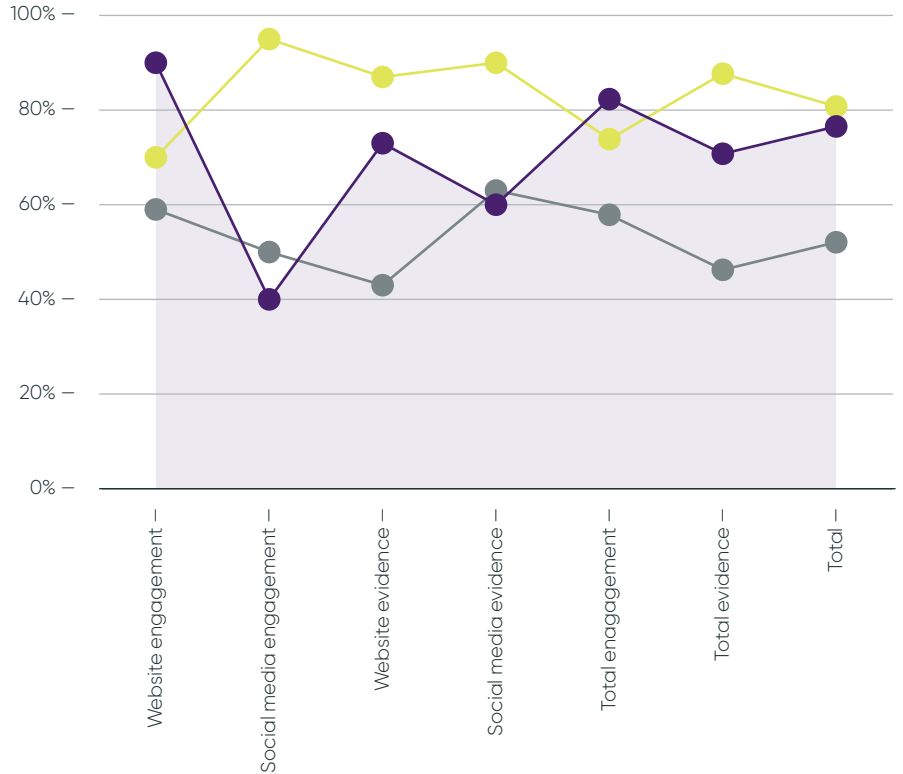
State Street Global Advisors

ssga.com



- State Street Global Advisors
- Sector leader
- Sector average

Classification:
▶ Determined



SSGA has streamlined its website presence and simplified the user experience by combining the ETF content with their other products, which now fully illustrates the breadth of their offering.

The home page is a study in content structure, presenting the user with the latest thought leadership article, featured funds, recent insights, focused content for financial professionals, the latest campaign-led content and the all-important positioning statement and company facts.

SSGA has always taken a purposeful and considered approach to their thought leadership content, and the ETF Education hub abundantly demonstrates this with articles tagged with length of read, guides to the asset class, survey reports and interviews with industry experts.

On the main Insights landing page, users can filter by asset class, topics and also by formats, with each result showing a pictorial representation of the content. This functionality continues with the very sophisticated search that is deployed site-wide.

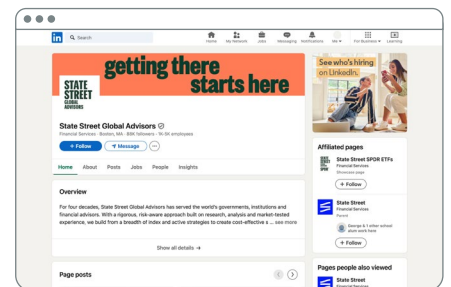
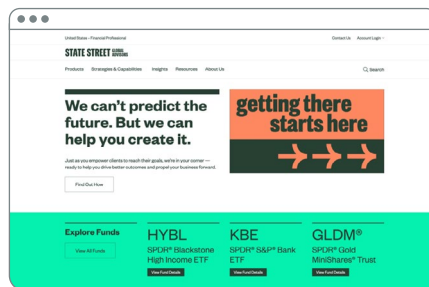
Key features

Engagement

- ▶ Excellent search returning pictorial results
- ▶ Intuitive user experience, concise user profiling
- ▶ Dedicated tools for advisor audience
- ▶ Comprehensive fund data and document library.

Evidence

- ▶ Brand purpose and mission stated on home page
- ▶ Excellent search returning pictorial results
- ▶ Excellent ETF Education hub
- ▶ Filterable content by asset class, topics and formats.



4TH

Aviva Investors

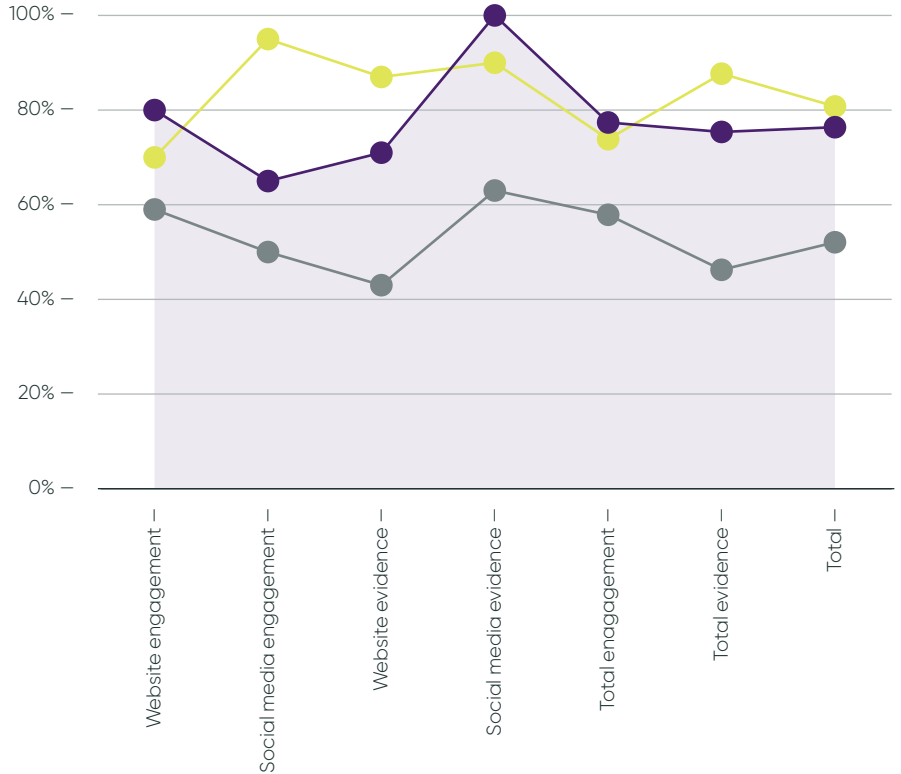
avivainvestors.com



- Aviva Investors
- Sector leader
- Sector average

Classification:

- ▶ Energetic



With a very striking and proprietary brand that is present from the home page all the way through the site and across all digital channels, Aviva Investors demonstrates how to leverage your brand assets.

One of the few asset managers that sees value in data visualization and infographics, the Views section houses a broad variety of thinking, in audio and visual formats as well as their award-winning AIQ publications on big themes. The Little Book of Data presents original and curated visuals, charts and graphics to illustrate key developments in economies and markets.

The home page allows quick access to thought leadership, investment capabilities, company news and culture content that includes clearly stating their brand values. There are CTAs and related content across the site, so the user journey never ends.

Propelled by exceptional content across all digital channels and a highly differentiated digital brand, Aviva Investors is a worthy top performer.

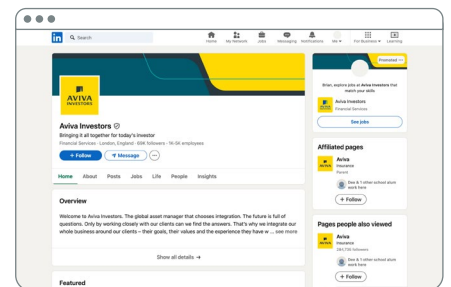
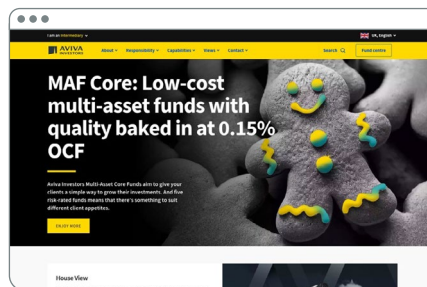
Key features

Engagement

- ▶ Excellent user experience and information architecture
- ▶ Use of content hubs for a myriad of insights content
- ▶ Scored 100% for web accessibility
- ▶ Distinctive signposting and navigation to capabilities and strategies in focus.

Evidence

- ▶ Strong, proprietary visual language
- ▶ Brand positioning supported by brand values
- ▶ Award-winning data visualization in The Little Book of Data
- ▶ Comprehensive ESG content and resources.



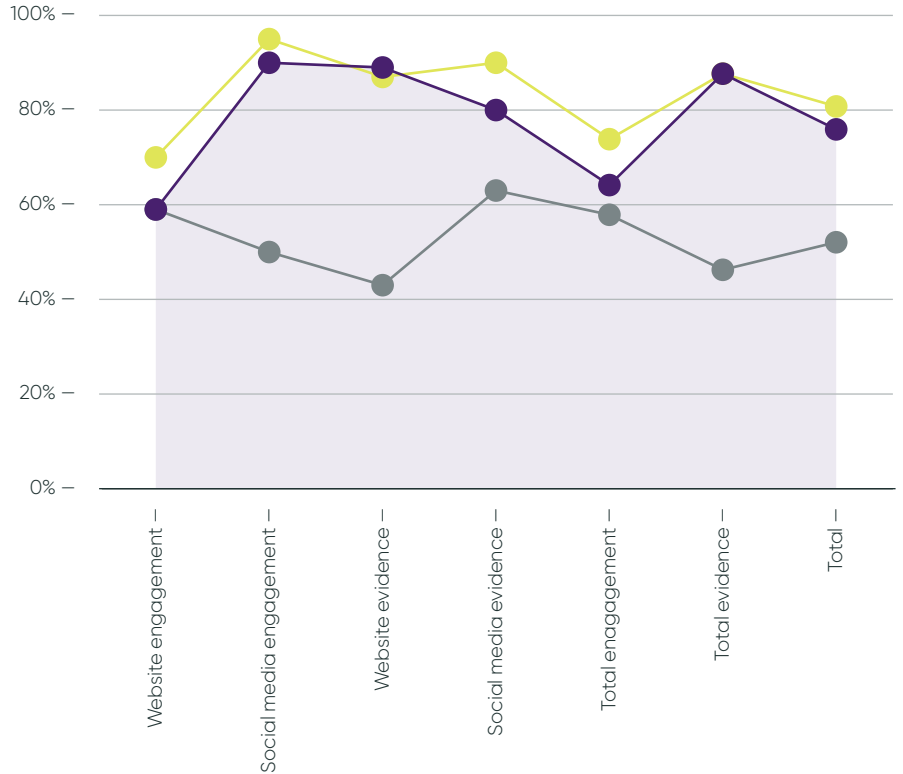
5TH AllianceBernstein

alliancebernstein.com



- AllianceBernstein
- Sector leader
- Sector average

Classification:
▶ Determined



A new entrant to the Top 5, and it's clear AllianceBernstein has really focused on their digital presence over the last year.

With a very bold, strong visual identity, innovative brand framework, including the use of distinctive typography and color, you are under no illusion as to which asset management site you are navigating.

Whether you are in the investments or solutions sections, or indeed Insights, the variety and quality of content is exceptional. Through the Insights Search you can filter content by category, topic, asset class and format, as well as by keyword. Formats include blogs, charts, commentary, infographics as well as video, podcasts and webcasts. A truly user-centric experience.

AB has also really embraced surfacing their humanity and people expertise across the site. From 'Meet AB's experts' in their ETF section, with characterful and personal videos of the team, to Investment Insights and Economic Perspectives featuring their thought leaders, people feature widely across the site.

Finally, the Practice Management area and the AB Advisor Institute, demonstrates their commitment to educating and supporting their advisor audience through a plethora of resources.

Images © AllianceBernstein

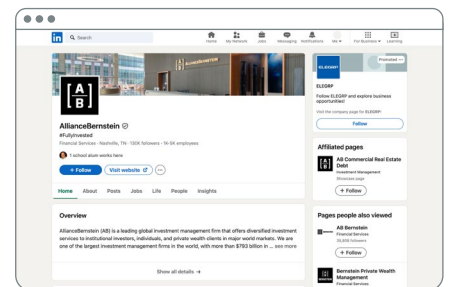
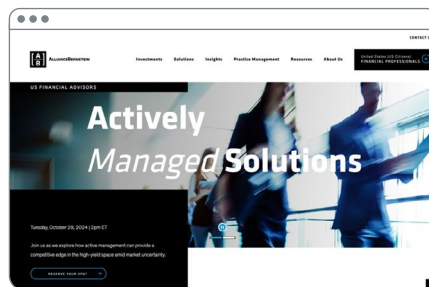
Key features

Engagement

- ▶ Excellent Insights search functionality
- ▶ Extensive social channels utilized
- ▶ Intuitive user experience
- ▶ Use of Chatbot in the ETF section.

Evidence

- ▶ People, expertise and humanity surfaced across the site
- ▶ Innovative brand framework, distinctive use of typography
- ▶ Comprehensive advisor content through the Advisor Institute
- ▶ Very strong social media content.



6TH

Schroders

schroders.com



Classification:

► Determined

Key features

- Intuitive user experience for multiple user profiles
- Navigate by capabilities, solutions or funds and strategies.
- Market leading infographics and survey data.

7TH

Capital Group

capitalgroup.com



Classification:

► Focused

Key features

- Advisor-focused practice management content, such as client conversations
- Variety of content types in Capital Ideas
- Client-focused online tools
- Active on all social media channels.

8TH

Janus Henderson

janushenderson.com



Classification:

► Energetic

Key features

- Excellent use of content modules on the home page
- Fund pages often contain educational or fund manager video and related insights.
- Insights section on home page features trending topics.

9TH

Invesco

invesco.com



Classification:

► Focused

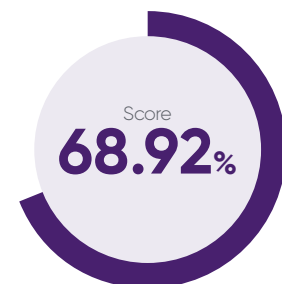
Key features

- Advisor-related tools, such as Client Conversations
- Capabilities pages feature products and related insights
- Impressive platform tool, Invesco Total CX, for advisors.

10TH

Goldman Sachs Asset Management

gsam



Classification:

► Energetic

Key features

- New and updated visual identity with client-focused language
- Main navigation leads with 'Find a Solution'
- Excellent and prominent use of case studies.

Discover where your firm stands and uncover opportunities for improvement by reaching out to Mark Stephenson to arrange a meeting.

BUILDING BRAND AND REPUTATION FOR ASSET MANAGERS: 6 Key components to **stand out**

In the crowded asset management sector, building a strong brand and reputation isn't exclusive to firms with the highest AUM, as the 2024 Living Ratings indicate.

Firms of all sizes have the potential to stand out by focusing on six key components that drive meaningful connections, differentiate their brand and resonate with clients. These efforts not only elevate brand perception but also translate into tangible business outcomes, enhancing growth and client loyalty.



1. Value Proposition: Define Your Brand Identity

A clear, unique value proposition is crucial for brand recognition. With more choices than ever, simply assuming visitors understand your brand is not enough. This should answer the all important questions of 'the who, the what and the why.' Be bold and try to differentiate your proposition.



2. Your Voice: Thought Leadership & Content

Using your voice to deliver high-quality thought leadership, educational material, viewpoints, conversation guides and research, positions you as the trusted industry expert and fosters stronger client relationships and loyalty.



3. Surface Humanity: Showcase People and Expertise

Showcasing your humanity from your fund managers and team, through to your employees, provides human-centric content and builds trust and enhances client engagement. Your people are the physical embodiment of your brand, so allow your clients to see and hear from them.



4. Demonstrate Choice: Highlight Offerings & Specialties

Be very clear and succinct in the presentation of your capabilities, strategies and funds. Logical and intuitive navigation on your website will enable clients to find relevant content quickly and accurate descriptions will assist with discovery through search. If you have a specialism and want to be known as such, promote it clearly.



5. Useful Technology: Elevate User Experience

Embracing the opportunities that evolving technology presents provides both transparency and an enhanced user experience. For example, digital and interactive data tools enable your clients to actively engage with your data. In addition, AI-driven search capabilities help deliver precise results and enable users to seamlessly sort relevant information and insights.



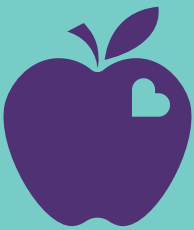
6. Meaningful Performance: Measure Brand Impact

As clients increasingly expect personalized engagement, asset management firms must adapt their KPIs to effectively track and measure conversions and engagement, aligning marketing efforts with tangible business outcomes. This year's Ratings shows that asset managers are beginning to personalize content, where appropriate, which is a critical step towards increasing content consumption, lead generation and ultimately, business growth.

KEEPING SCORE

Would you like a more detailed analysis of your firm? Do you feel you could benefit from a new brand and website, relevant content, or a more effective social media strategy? If so, we'd love to hear from you.

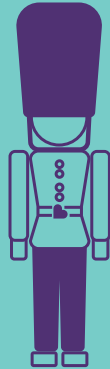
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WE ARE AGENTS OF CHANGE

Celebrating 20 years of creating difference

For two decades we've used our deep sector knowledge, uncompromised thinking and award-winning creativity to help our clients in the financial, professional services and technology sectors. We create difference through branding expressions that engage, digital experiences that disrupt, and integrated advertising campaigns that drive results.

Driven by our brand values of thoughtful, specialist, determined, genuine and independent since day one, we are passionate about what we do and continue to evolve and grow in an ever-changing business environment.

What defines us

Our specialists' deep understanding of our clients' sectors means we challenge thinking and perception, inspire excitement and ambition, and help to deliver rewarding outcomes. In a world that is content rich, visually crowded and always changing, we empower our clients to communicate their difference and stay ahead.

What we do

Engaging branding

Our creative teams in New York, London and Hong Kong deliver award-winning ideas with proven results, driving your business performance with strategic thinking, brand creation and enhancement,

and stand-out messaging. We fuse these key elements together to generate highly effective visual and verbal expressions of your firm.

Disruptive digital

Our digital team connects your brand and your audiences. Around the world. Around the clock. We build seamless brand experiences online, using bespoke information architecture, engaging design and cutting-edge technology across multiple devices and platforms.

Integrated campaigns

We can help transform your brand objectives into tangible business benefits – stimulating dialogue, lifting your profile, prompting consideration,

and spurring action. We research, plan and execute advertising and social media campaigns worldwide, applying distinctive ideas and creative, backed by relevant analytics to measure your success.

Creating difference for our people and communities

We don't just make a difference for our clients. We also make a difference for the talented people in our teams and the communities where we work. We have an open and collaborative culture that gives our people room to thrive. We encourage passionate, free-thinking ideas that challenge the conventional and celebrate individualism and diversity.

Find out more: www.living-group.com

**Want to know how your firm has scored across each of our key criteria?
Please reach out to [Mark Stephenson](#) to arrange a meeting.**

BUILDING
BRAND
BUILDING
REPUTATION

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