

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Advyzon Releases Asset Allocation Study and White Paper Titled, “What’s Going on With Assets?”

Special report analyzes why advisors are rethinking the 60/40 portfolio and how advisors are investing today

CHICAGO, IL (October 4, 2022) – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, recently released [“What’s Going on With Assets?”](#), a white paper that analyzes how financial advisors are allocating assets and how those allocations have evolved over the course of the past four years.

One eye-opener: The data from the comprehensive study not only shows a divergence from the traditional 60/40 portfolio as of the end of 2021, but it also shows that advisors haven’t been following that template for quite some time. At the end of 2017, financial advisory firms using Advyzon had 54% of their assets under management (AUM) in equities, compared to 20% in fixed income (with remaining assets in cash, commodities, alternatives, and other categories). However, at the end of 2021, equities increased to 66% of assets under management and fixed income accounted for only 18%. A more detailed breakdown of how asset allocation has shifted between the end of 2017 and the end of 2021 can be found in this [summary article](#) available in the Viewpoints section on the Advyzon website or by [downloading the full white paper](#).

STUDY METHODOLOGY AND DETAILS

Advyzon’s cloud-based platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage, making it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon is currently serving nearly 1,200 advisory firms. Data for this study was pulled from all firms

anonymously to protect firm and client data. In addition to spearheading the data pull and analyzing the data, Advyzon Product Manager Kelly Fitzpatrick authored the white paper.

“We know advisors are interested in what their peers are doing, and we can see on our end that sometimes what’s actually happening with portfolios doesn’t match the broad narrative we’re seeing in the media,” said Fitzpatrick. “We collected this data and put together this white paper because we wanted to give advisors a more realistic glance at what’s happening across the industry.”

One example of a splashy trend that Advyzon’s study showed *isn’t* playing out in assets under management yet is cryptocurrency. At the end of 2021, less than a basis point worth of AUM was invested in cryptocurrency.

A trend that *is* shown to be playing out as reported is the rise of exchange-traded funds (ETFs). Mutual funds are still the most popular product used by advisory firms on the Advyzon platform, but ETFs are closing the gap.

“I expect that our database will show mutual fund and ETF exposures close to parity at the end of 2022,” said Brian Huckstep, CFA, CFP®, Chief Investment Officer of Advyzon Investment Management (AIM), Advyzon’s turnkey asset management program (TAMP) launched in March 2022. While Huckstep credits low fees and the popularity of passively managed funds for much of that trend, Huckstep also points out that mutual funds aren’t going anywhere – especially actively managed funds with exposure to less liquid or less commonly-understood assets.

To read the full report and download the white paper, [please click here](#).

ABOUT ADVYZON

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology for independent financial advisors and registered investment advisors (RIAs). The Advyzon tech platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. Financial advisors inspire their innovation and integrations, and their exceptional technology and unmatched service exist to improve the advisor experience – whether it’s via portfolio and firm management or client relationships and growth. To learn more about Advyzon, visit www.Advyzon.com.

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