

22.3% of the Surveyed Respondents are Ready to Take Moderate Risks while Making Investment Decisions

Only 11.5% of surveyees agreed to have been consistently profitable in their investment regimes.

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/EINPresswire.com/ -- GoodFirms, an internationally recognized B2B ratings, and reviews platform, recently released its new research report-"Investment Management - Types, Benefits, Goals, Challenges, and Opportunities." The survey attempts to identify and analyze the current investment avenues for individuals and businesses. It also reveals valuable insights to assist investment companies in planning better strategies and investment solutions for their clients. Further, it has also disclosed top trends in the investment management realm, their key benefits, challenges, and future.



Investment Management

“

70.5% invest on their own without the guidance of an Advisor.”

GoodFirms

In today's complex and rapidly changing financial landscape, investment management has become more demanding than ever before. The complexity of investments may vary depending on the investment strategy and the individual's risk tolerance.

“Investment management is responsible for making investment decisions and implementing strategies that create balanced and defensive portfolios, mitigate investment risks and maximize returns,” says GoodFirms.

68.9% of the surveyed investors by GoodFirms identify themselves as conservative and risk-averse in their investment, whereas 22.3% of them are ready to take moderate risks in investment, and 8.8% asserted having a higher risk appetite in terms of investment.

“The age of the investor, investment timeframe, individual investor mindset, disposable income, financial knowledge, and past experience are the six factors that determine the risk appetite or risk tolerance of the investors,” reveals GoodFirms.

Research reveals that 71.2% of surveyees assert long-term growth as their investment goal, 44.2% stated regular income, 33.6% mentioned capital preservation, 28.6% considered asset diversification, 22.8% said mid-term growth, and 11.5% mentioned short-term growth as their investment aim goal.

Further, GoodFirms queried investors about their preferred investment avenues. 61.5% invest in fixed investment instruments (fixed deposit), 57.6% prefer real estate, 55.8% go for a recurring deposit, 43.2% invest in stocks, 34.8% choose mutual funds, 23.5% insurance investment and others invest in bonds, debenture, cryptocurrencies, etc.

GoodFirms research also unveils the top investment management strategies where about 69.3% prefer systematic investment plans (SIPs), 51.3% go with buy & hold investing, and 50.6% prefer dividend growth investing. Quality investing, passive/index investing, socially responsible investing, value investing, averaging and green investing are other most preferred investment strategies.

Investment safety, performance history, high returns, tax benefits, lock-in period, risk-reward ratio, expense ratio, and investment objective are the key factors that investors consider while selecting an investment avenue.

Research also reveals the top benefits of investment management, such as diversification of investments, better tax planning, and savings, access to professional expertise, increased potential for higher returns, and reduced investing risk. Other benefits of professional investment management include customized investment solutions, access to exclusive investment opportunities, ability to invest in socially responsible/ sustainable investments, and assistance with financial planning and goal setting.

Lack of knowledge or experience, finding the right investment opportunities, extreme market volatility, emotional decision-making, difficulty in assessing risks, understanding or interpreting financial statements and market data, keeping up with changing market trends, and regulations are the significant challenges associated with investment management.

81.2% prefer investments with little or no fluctuation in value and accept the lower returns associated with these investments–GoodFirms Survey 2023.

Furthermore, GoodFirms research unveils the top trends in investment management, such as increasing interest in alternative investments, sustainable and impact investing, Artificial Intelligence (AI) and Machine Learning, Blockchain in investment management, big data in investment management, emerging ‘investment fintech’ companies, customized portfolio and

personalized indexing, and growing investments in quantum computing technology.

GoodFirms concludes that a balanced approach with new investments like alternative investments, AI-powered algorithmic trading, ESG options, etc., and traditional investment methods and avenues are critical for success in the current investment environment.

Key Findings:

70.5% of surveyed respondents invest on their own.

14.4% invest based on the advice of family and friends.

5.1% of surveyed respondents have hired an investment management agency/firm.

91.5% of surveyed respondents consider investment safety before choosing the investment avenue.

82.1% of surveyed investors evaluate the performance history of an investment avenue before investing.

77.5% of respondents consider high returns a critical factor when selecting an investment avenue.

83.6% of investors stated diversification of funds is a prime benefit of investment management.

69.5% of the surveyees said tax planning and savings as the top benefit of investment management.

About Research:

GoodFirms Survey- "Investment Management - Types, Benefits, Goals, Challenges, and Opportunities" queried 815 investors, investment professionals, and businesses to understand their investment objectives, behavior, and strategies.

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