

Announcing A New Strategic Insight Report

## Managed Volatility: The Anatomy of an Investing Trend

Strategic Insight is pleased to announce its newest report, which examines the new trend of managed volatility. Despite the rapid growth of “managed volatility” mandates, there is no standard definition within the industry, creating hurdles to proper analysis and understanding of these offerings. Although managed volatility funds have been around for some time, the financial crisis has spurred new interest in this category, which has become especially popular in the variable annuity (VA) space with over \$108 billion in assets as of the end of September, 2012. This report explains the dynamics of this new trend and provides our perspective on how we predict this trend will further evolve.

This report includes:

- ◇ Comprehensive list of 175 managed volatility funds, 98 VA funds and 77 open-end mutual funds, from 32 different advisors, separated into VA and mutual fund universes.
- ◇ Total assets, net flows, fees, and performance data for every currently active managed volatility fund.
- ◇ Detailed explanation of our methodology for defining managed volatility.
- ◇ Analysis of funds that were converted to a managed volatility strategy, comprising over \$20 billion in assets.
- ◇ List of “low volatility” funds.
- ◇ Illustrative graphs emphasizing the most popular styles of volatility management, sub-advised funds, and fund assets and flows over time.

For more information on the report contact:

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### What is the report useful for?

- Positioning New Products
- Benchmarking current products
- Strategic Planning