

MEMO# 2664

April 4, 1991

ICI PERMANENT LONGITUDINAL PANEL OF SHAREHOLDERS

April 4, 1991 TO: RESEARCH COMMITTEE NO. 8-91 INDUSTRY STATISTICS COMMITTEE NO. 4-91 DIRECT MARKETING COMMITTEE NO. 11-91 PUBLIC INFORMATION COMMITTEE NO. 11-91 SALES FORCE MARKETING COMMITTEE NO. 10-91 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 9-91 RE: ICI PERMANENT LONGITUDINAL PANEL OF SHAREHOLDERS
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@@@@@@@@@@@@@@@@ The ICI research staff have been investigating the possibility of establishing a permanent longitudinal panel of shareholders for the purpose of studying mutual fund owners over time and reporting regularly to members on a variety of findings. For Discussion: At the request of the Marketing Committee, your opinion is sought on the usefulness of such a panel. The information attached provides background on the operating specifications of such a panel and provides examples of the types of research findings that can be obtained using a longitudinal panel. There will be opportunity to discuss this at your upcoming Committee meeting. Jacob S. Dreyer Vice President, Chief Economist