

MEMO# 1205

June 16, 1989

1988 INSTITUTIONAL SURVEY

July 26, 1989 TO: MEMBERS - ONE PER COMPLEX NO. 20-89 RE: 1988 INSTITUTIONAL SURVEY

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@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@ The enclosed report summarizes the results of the Institute's 1988 Institutional Survey. This annual study provides detail on the increasing use of mutual funds by institutional investors. Assets as well as number of accounts represented by various types of institutions are presented for each investment objective category. Historical data series have been revised to reflect a more accurate method of identifying multiple service accounts. Tables for 1985 and 1986 have been included to enable the tracking of account data. These data have relevance for marketing strategy in a number of ways. Members can identify which types of institutions invest more heavily in funds and which types are increasing (or decreasing) the assets they place with funds. One copy of this report is being sent to each member organization. If you desire additional copies, or if you have any comments on the survey, please contact me at the Institute.
Anne Schafer Director Statistical Research

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