

EVENT MATERIAL

April 18, 2021

Webinar: 2014 Fund Reclassification

ICI WEBINAR

2014 Fund Reclassification

March 25, 2014

The Investment Company Institute (ICI) hosted a webinar and conference call on March 25, to present its modernized fund classifications for open-end mutual funds.

To help members, analysts, and the public understand trends in mutual fund investing, ICI reports data on open-end mutual funds at several levels. Every year, ICI reclassifies funds based on changes in their prospectus language, and periodically—about once every 10 years—ICI refreshes all of its database classifications. The 2014 reclassification updates the entire database and gives users more detail to examine current industry investment trends; for example, it provides classifications for growth, alternative strategies, global equity, and flexible portfolio funds.

MATERIALS

- [Archive recording](#)
- [Slides \(pdf\)](#)

HIGHLIGHTS

- Provided an overview of the new investment objective classifications
- Discussed why ICI is reclassifying funds
- Explained how the fund reclassification impacts historical data

SPEAKERS

- **Brian Reid**
Chief Economist
Investment Company Institute
- **Judy Steenstra**
Senior Director, Statistical Research
Investment Company Institute

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