

RESOURCE DOCUMENT

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What US Households Consider When They Select Closed-End Funds

ICI conducts the Annual Mutual Fund Shareholder Tracking Survey each year to gather information on the demographic and financial characteristics of mutual fund-owning households in the United States. In the most recent survey that was conducted from May to June 2024, ICI asked additional questions for households that held closed-end funds (CEFs).

Read more in [the paper](#).

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