FinPro Report

2023

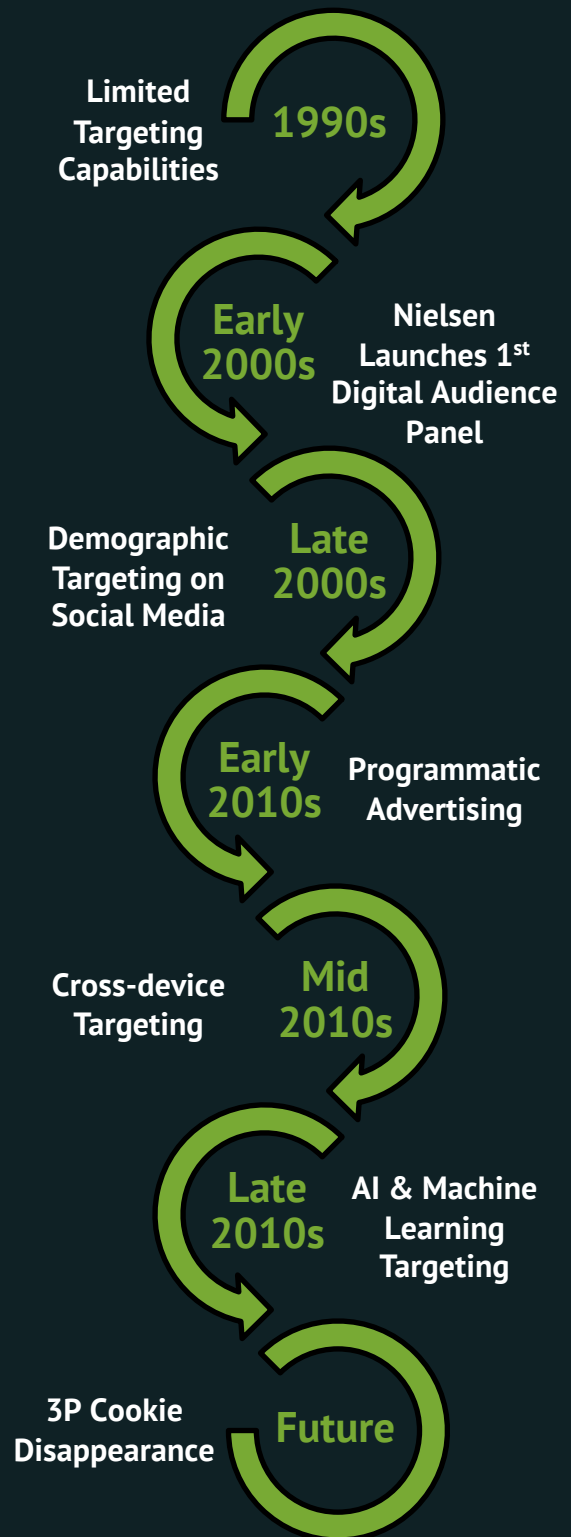Smart Voices.
Meaningful Engagements.
Superior Results.

Digital Advertising: Embracing Precision Targeting

The conventional approach of using surveys to identify financial professionals across various media platforms has become obsolete in today's digital era. With the use of technology, precise targeting has become possible, resulting in greater efficiency and effectiveness of advertising budgets.

The current digital landscape offers advanced targeting capabilities, which enable agencies to reach their desired audience more effectively and efficiently. In particular, cookie-matching technology allows advertisers to identify financial professionals across multiple sites and devices, resulting in zero wasted impressions. At InvestingChannel, over 100+ publishers allow cookie-matching, enabling precise targeting of financial professionals across multiple sites.

Moreover, precise targeting offers other benefits, such as better measurement of campaign success and increased ROI. By leveraging data and insights on target audiences, advertisers can create more relevant and engaging content, resulting in higher engagement and conversion rates.

Limited Targeting Capabilities — 1990s

Early 2000s — Nielsen Launches 1st Digital Audience Panel

Demographic Targeting on Social Media — Late 2000s

Early 2010s — Programmatic Advertising

Cross-device Targeting — Mid 2010s

Late 2010s — AI & Machine Learning Targeting

3P Cookie Disappearance — Future

Old vs. New Comparison

1

Scenario 1:

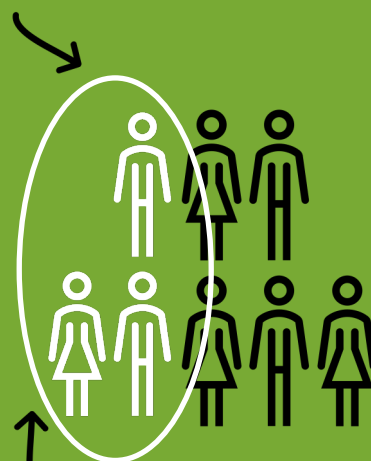Traditional Approach of serving ads on sites with high concentration of Financial Professionals

Target Whole Site
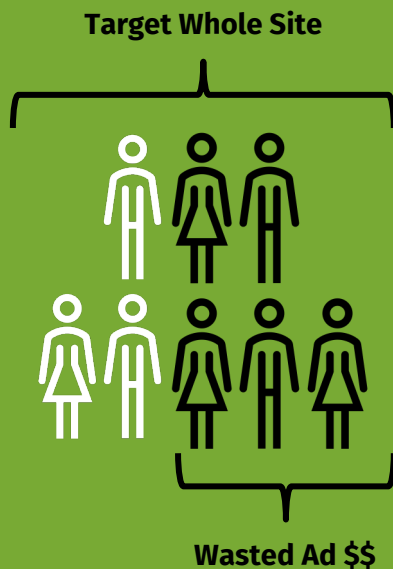
Wasted Ad $$

2

Scenario 2:

Using technology to target only FinPros on any site.

Target Your Audience

Pay Only for Impressions to Your Audience

- **Efficiency:** Targeting FinPros on any site saves resources and avoids wasted impressions.

- **Precision:** Data and analytics enable accurate targeting of FinPros based on their browsing behavior, interests, demographics, and more.

- **Scale:** Targeting FinPros on multiple sites expands reach and potential for ROI.

- **Flexibility:** Targeting FinPros on many sites managed by the same company allows for easy adjustments and reallocation of ad spend.
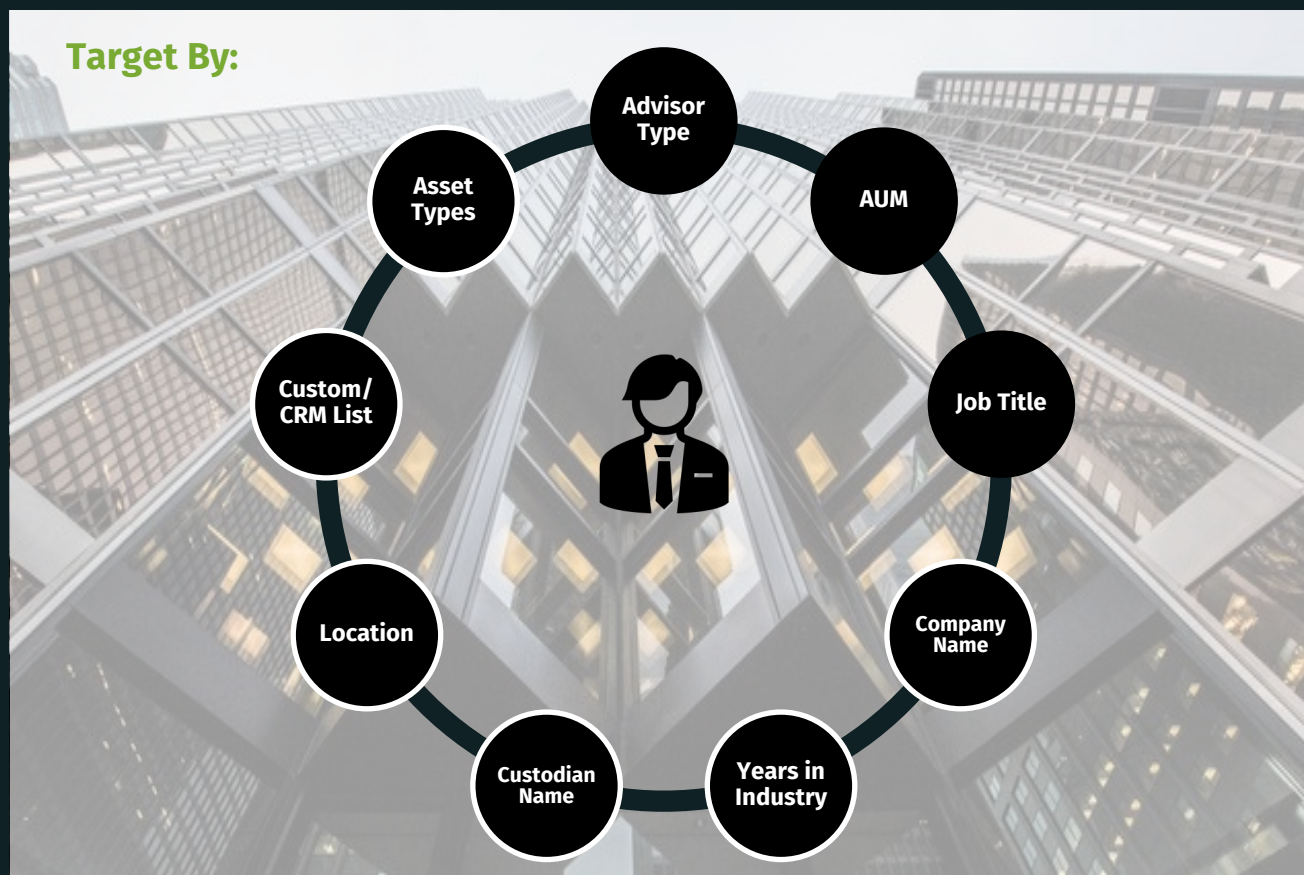
IC Financial Advisors

InvestingChannel leverages advanced ad-targeting technology to connect with over 310K Finra registered Financial Advisors across multiple sites. By matching CRD- authenticated Financial Advisor data to their respective digital user-profiles, we gain valuable insights into their preferences and intent. This enables us to create highly effective campaigns that are precisely targeted based on their behavioral data.

FA Segments Include:

- Financial Advisors: 310K
- Broker Dealers: 180K
- Independent RIAs: 61K
- Wirehouse Brokers: 56K

- Financial Professionals: 3M
- Retirement Advisors: 59K
- Non-Advisor Finra Reps: 154K
- And more.

Target By:

- Advisor Type
- Asset Types
- AUM
- Custom/CRM List
- Job Title
- Location
- Company Name
- Custodian Name
- Years in Industry

IC Financial Advisors

Tenure as Financial Advisor:

80%
>5 Years of Experience

34%
>10 Years of Experience

29%
>15 Years of Experience

Assets Under Management:

81%
> $10MM

63%
> $50MM

22%
> $100MM

10%
> $1B
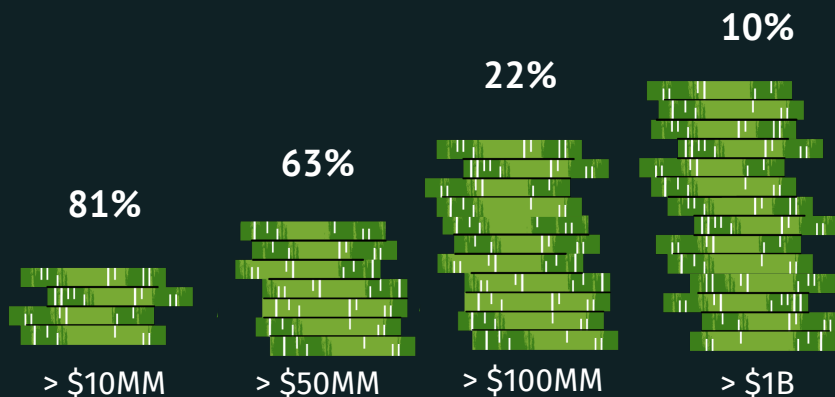
Topics of Interest:

We've partnered with Bombora to analyze the online behavior of IC Finance Professionals compared to the broader universe of Finance Professionals.

345 Index
Options/Futures

333 Index
Currencies

323 Index
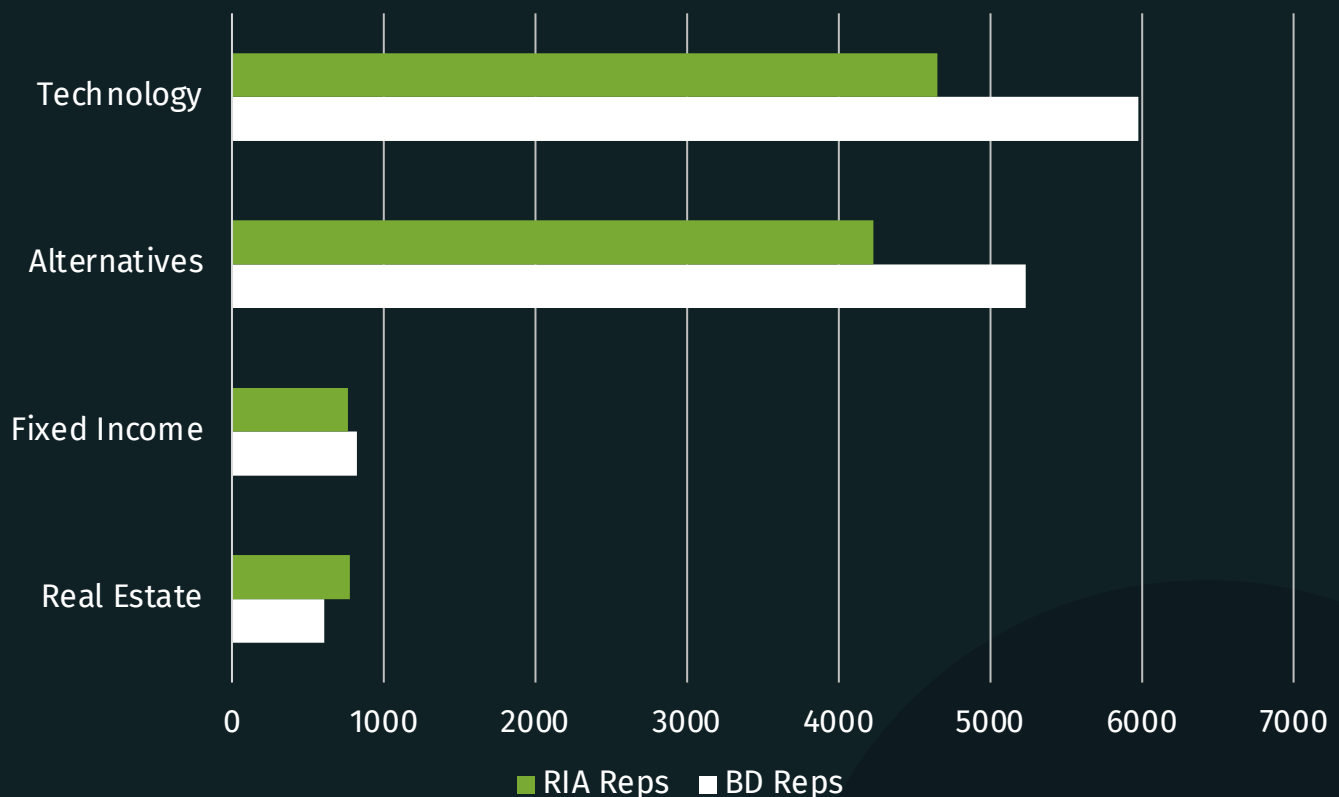Volatility

315 Index
Technology

284 Index
Fixed Income

FinPro TrackStarIQ Data Trends

TrackstarIQ is a proprietary data technology that leverages several advanced platforms to track what financial advisors are researching across 100+ sites.

Researched Categories by Advisor Type:

Category	RIA Reps	BD Reps
Technology	~4600	~6000
Alternatives	~4200	~5200
Fixed Income	~750	~800
Real Estate	~800	~600

0   1000   2000   3000   4000   5000   6000   7000

■ RIA Reps   ■ BD Reps

Most Researched Industries in Q1 2023:

Regional Banks

REITs

Recreational Vehicles

*as compared to Q4'22

FinPro TrackStarIQ Data Trends

Most Searched ETFs in Q1 2023:

1	SPY	SPDR S&P 500
2	QQQ	Invesco QQQ
3	TLT	iShares 20+ Year Treasury
4	GLD	SPDR Gold Shares
5	TQQQ	ProShares UltraPro

Surging ETFs in Q1 2023:

1	SIL	Global X Silver Miners
2	CPER	U.S. Copper
3	SPXU	ProShares Ultrashort S&P
4	SGOV	iShares 0-3Mo Treasury
5	BOTZ	Global X Robotics and AI

*as compared to Q4'22

Most Searched Phrases by FinPros in Q1 2023:

- "Small Cap"
- "Bond Yield"
- "Artificial Intelligence"

- "Real Estate"
- "Natural Gas"
- "Morgan Stanley"

Most Popular FinPro Sites:

RealClear Markets

barchart

INSIDER MONKEY

4-traders

TIPRANKS KNOW WHO TO TRUST

The Fly

OTC Markets

STOCK ANALYSIS

finviz

macrotrends

BROKERCHALK