



Treasury Curve™ poll reveals surprising investment practices among institutional investors

Most trust their personal investments from a single, independent provider that offers investment products from multiple providers — but, for most, their buying habits at work are entirely different.

MENLO PARK, Jan. 1 — As online investment sites become more ubiquitous in the private sector, many institutional investors are still clinging to their old way of doing business ... even though they have more trust in independent providers that offer investment products from multiple providers.

That's one of many surprising results from a poll recently conducted by [Treasury Curve™](#), a firm based in Menlo Park, Calif., that provides access to institutional money market funds from multiple providers on a single platform. The survey was commissioned to test the assumptions made by Treasury Curve™ in its most recent white paper [Institutional Investors Seek Independent, Objective Advice, Instant Access to Investments](#).

The obvious question is, Why do investors prefer one method for themselves, but they do something differently when they go to work? [Aron Chazen](#), managing director for Treasury Curve™, suggests it's just a matter of time before institutional investors come around.

”The technology is available on retail sites such as Schwab and E*Trade. It’s no surprise that more institutions are looking to take advantage of the [same conveniences in the workplace](#).”

Among the most notable results from the survey:

- 75 percent invest in institutional money market funds.
“When I began my career in institutional cash management in 1991, institutions were just beginning to consider money funds as viable investment alternatives,” Chazen said.
- 76.5 percent invest in government assets (such as agencies or funds or portfolios that hold agencies) and 78.1 percent invest in treasuries (such as U.S. Treasuries or funds or portfolios that hold treasuries) and investments in the prime asset class (i.e. commercial paper) make up only 49.2 percent.
“Until the [market turmoil](#) began, the majority of institutions typically invested in the prime asset class,” Chazen said. “Institutional investors will likely continue to ease back into prime investments as they seek higher returns and feel less vulnerable in the markets.”
- 64% prefer to purchase their investments from a single provider that offers investment products from multiple producers, yet:
 - 32.8 percent, the greatest response, still call their fund provider directly
 - 77.1 percent of the funds selected as “important to have access to” were funds from asset managers not affiliated with any one bank.
“Traditionally, clients choose to invest their money with credit banks,” Chazen said. “Perhaps this demonstrates that clients are focusing on how their money is managed as opposed to which institution is managing their money.”

Aron Chazen is available for comment at (877) 982-8783 or visit <http://treasurycurve.com/> for more information.

[Aron Chazen](#) is a Managing Director of [Treasury Curve™](#). Prior to cofounding the firm, Aron was a Managing Director at J.P. Morgan where he was responsible for running the Global Cash business in the Americas providing asset management solutions for corporations and public sector clients.

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