

# The empowered investor

What makes an empowered investor? The Global Investor Study 2022 shows that investment knowledge\* and age have an impact on how empowered people in Canada feel.

But does this paint a true picture? How can people be empowered further? To find out, we surveyed over 23,000 people who invest from 33 locations globally.

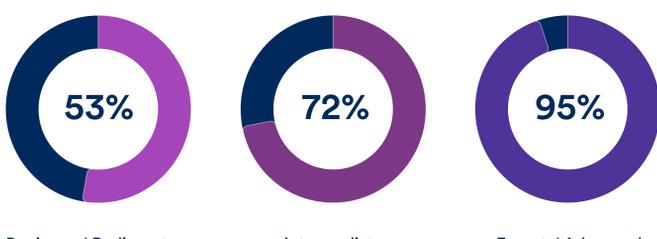
\*self-reported



## People in Canada with advanced knowledge are more likely to feel that as shareholders, they should have the power to influence companies

People who feel that as shareholders they should have the power to influence companies

Level of investment knowledge\*

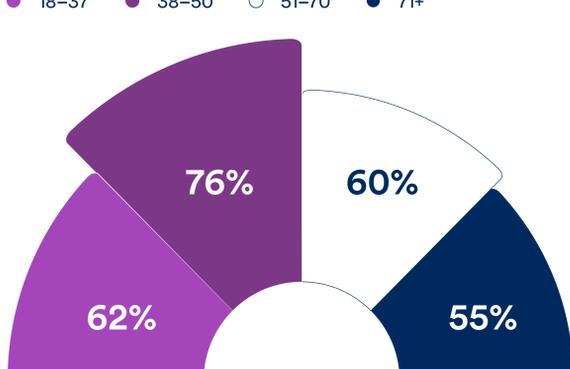


\*self-reported

## Younger investors in Canada are more likely to prioritize values and principles

People who feel it is important that the funds they invest in are built around their values and principles

● 18-37 ● 38-50 ○ 51-70 ● 71+



## Many people in Canada want access to traditionally more exclusive assets

Which of the following private assets do people want to invest in?



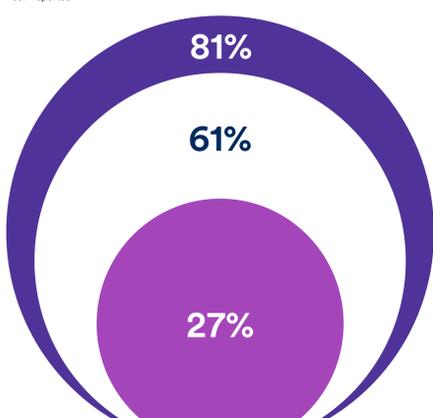
## Most expert / advanced people in Canada feel confident that they have the knowledge to make the right decisions for their financial future

People who feel that they have sufficient knowledge to feel confident in making investment decisions that affect their future

Level of investment knowledge\*

● Beginner / Rudimentary ○ Intermediate ● Expert / Advanced

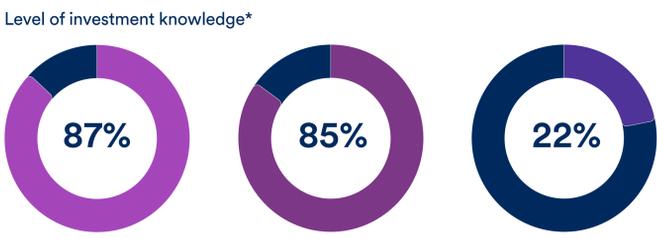
\*self-reported



## But are people in Canada as knowledgeable as they think?

People who answered our investment knowledge test question incorrectly

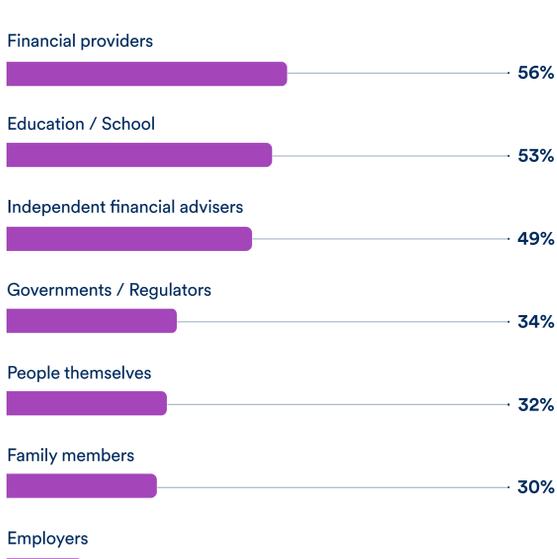
Level of investment knowledge\*



\*self-reported

## Empowerment comes with education, and everyone in Canada has a role to play

Who should be responsible for ensuring that people have a sufficient level of knowledge on personal financial matters?



Schroders commissioned alan. agency and iResearch to conduct an independent online survey of 23,950 people (21,131 non-retired and 2,819 retired) in 33 locations around the world between 18th February and 7th April 2022. This research defines "people" as those who will invest at least €10,000 (or the equivalent) in the next 12 months and who have made changes to their investments within the last 10 years. These individuals represent the views of people in each location included in the survey.

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