

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 Switzerland feel.

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

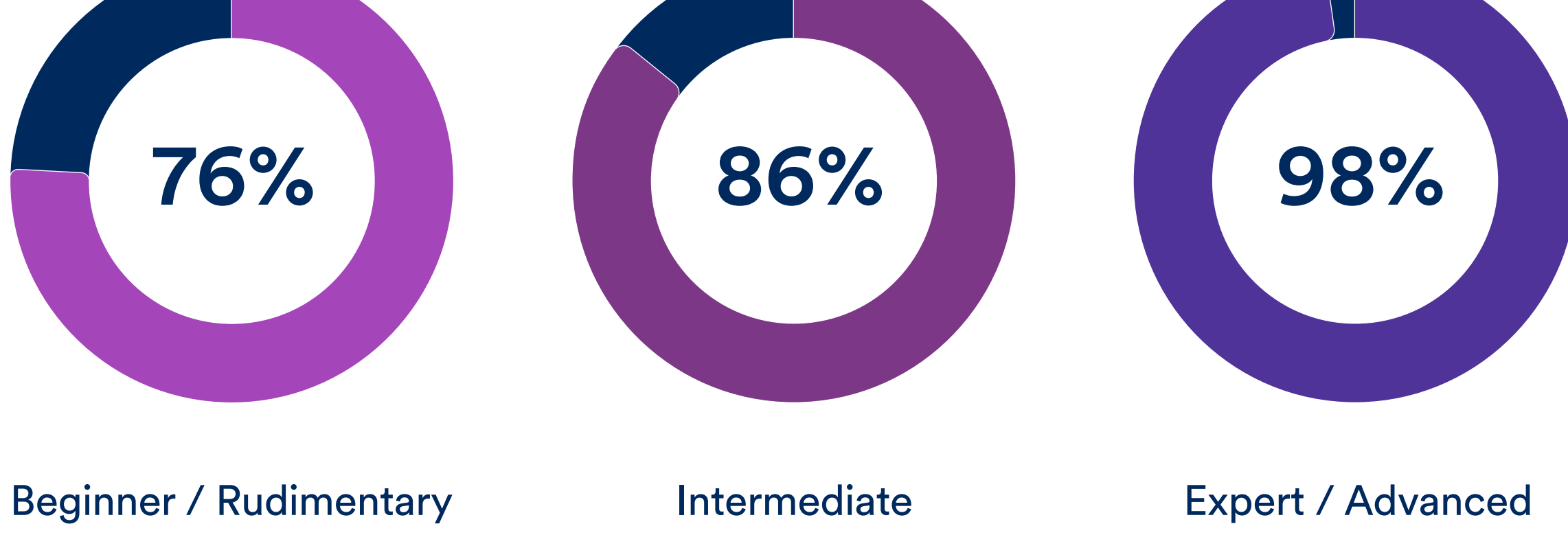
* self-purported



People in Switzerland 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*

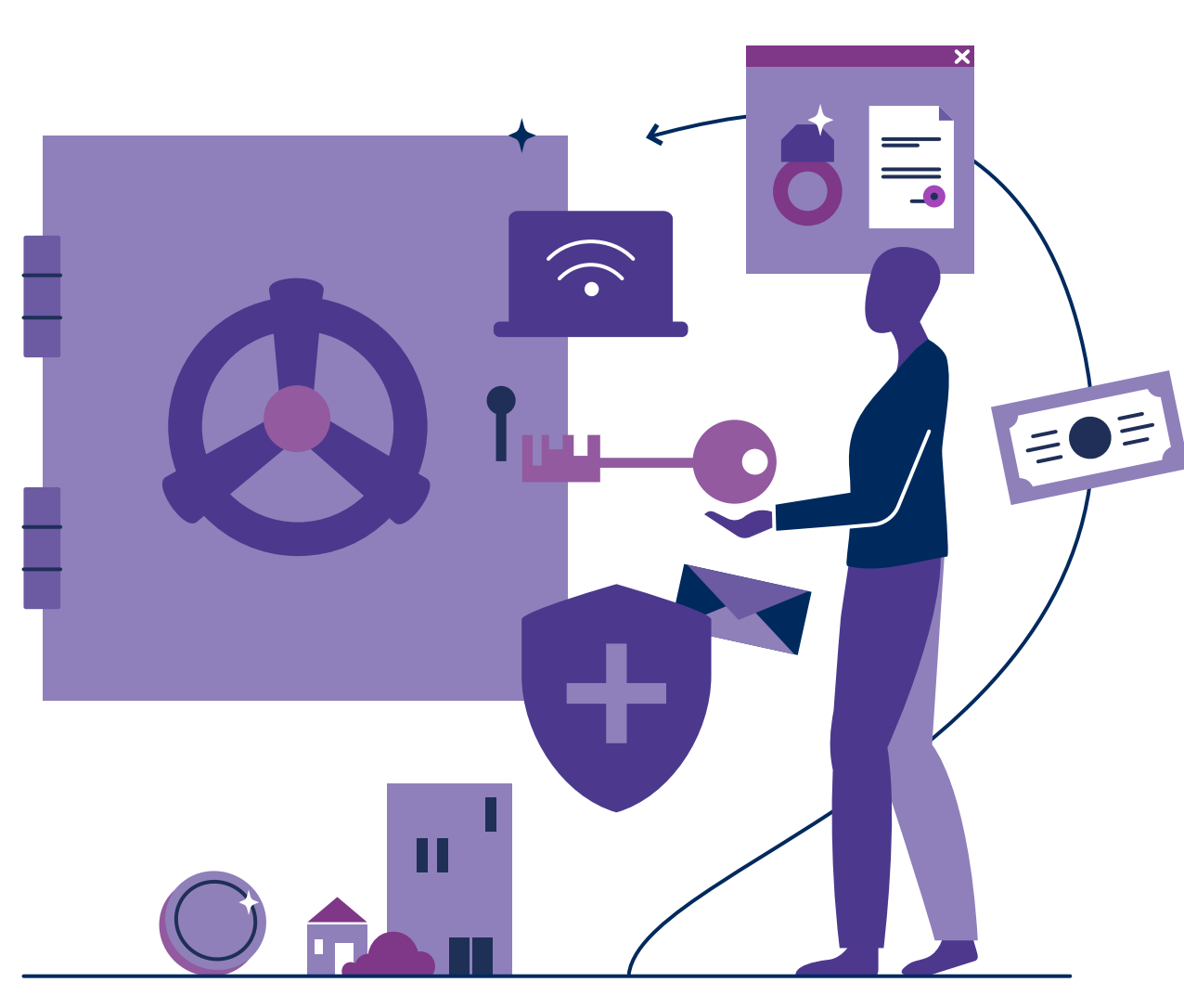
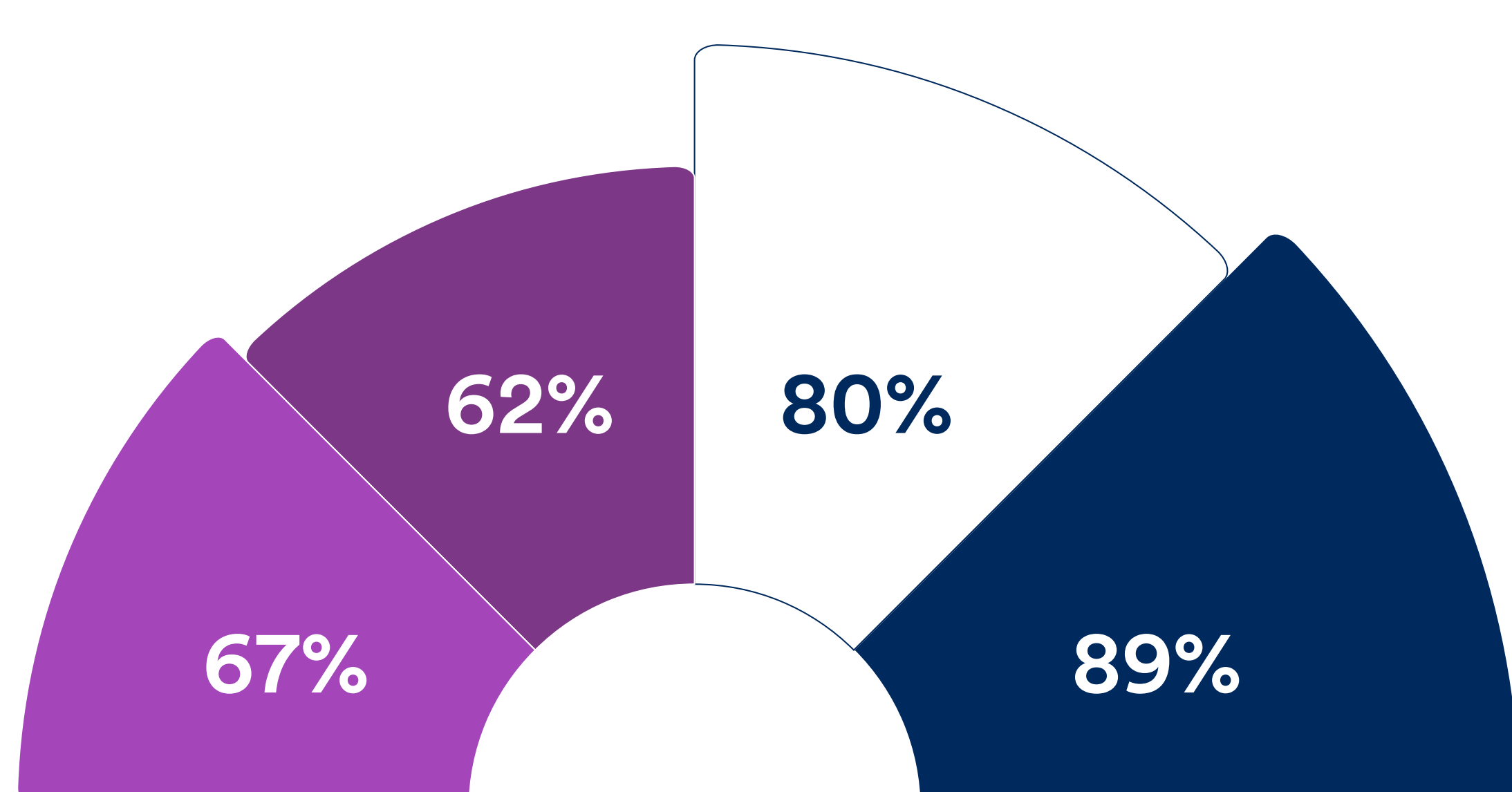


*self purported

Older investors in Switzerland are more likely to prioritise values and principles

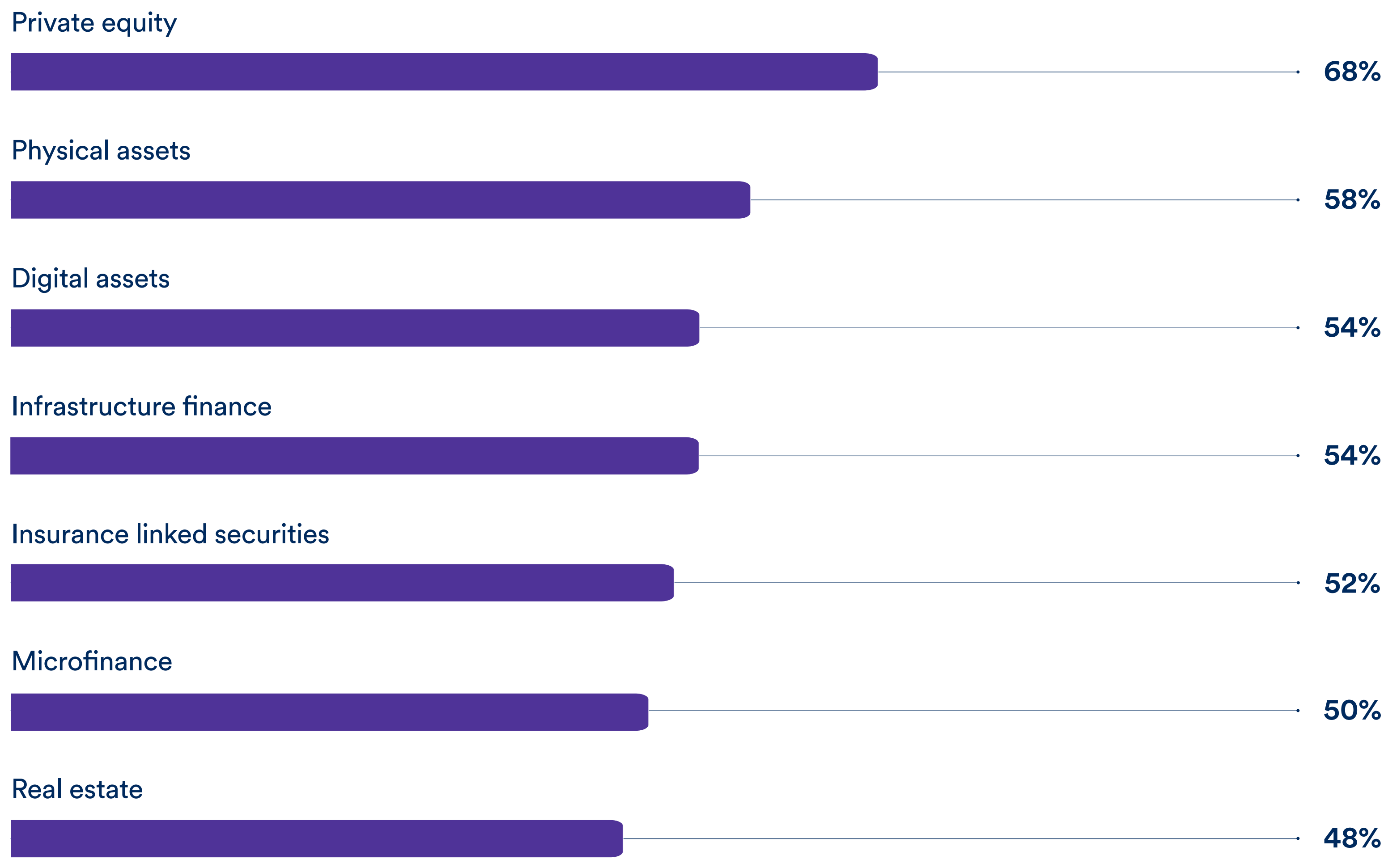
People who feel it is important that the funds they invest in are built around their values and principles

● 18-37 ● 38-50 ○ 51-70 ● 71+



Many people in Switzerland want access to traditionally more exclusive assets

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



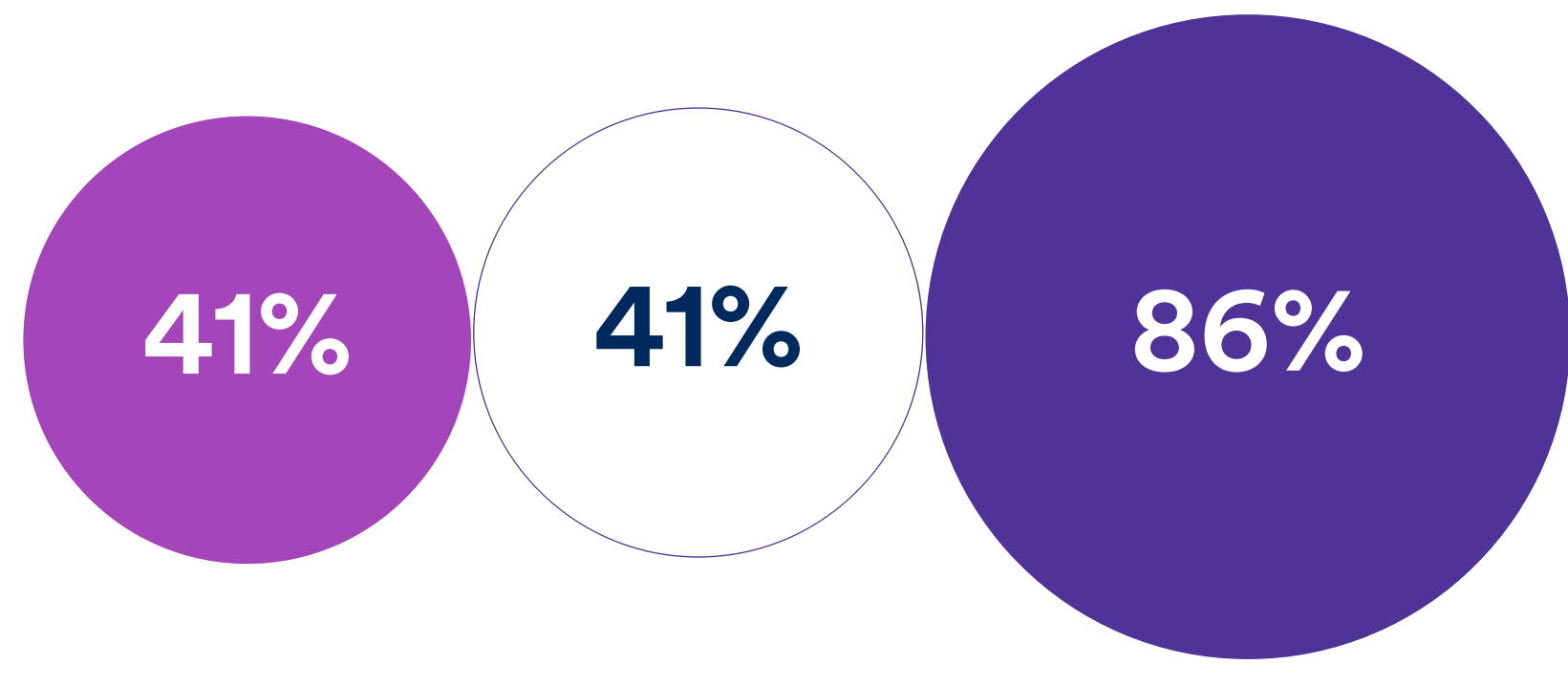
Most expert / advanced people in Switzerland feel confident that they have the knowledge to make the right decisions for their financial future

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

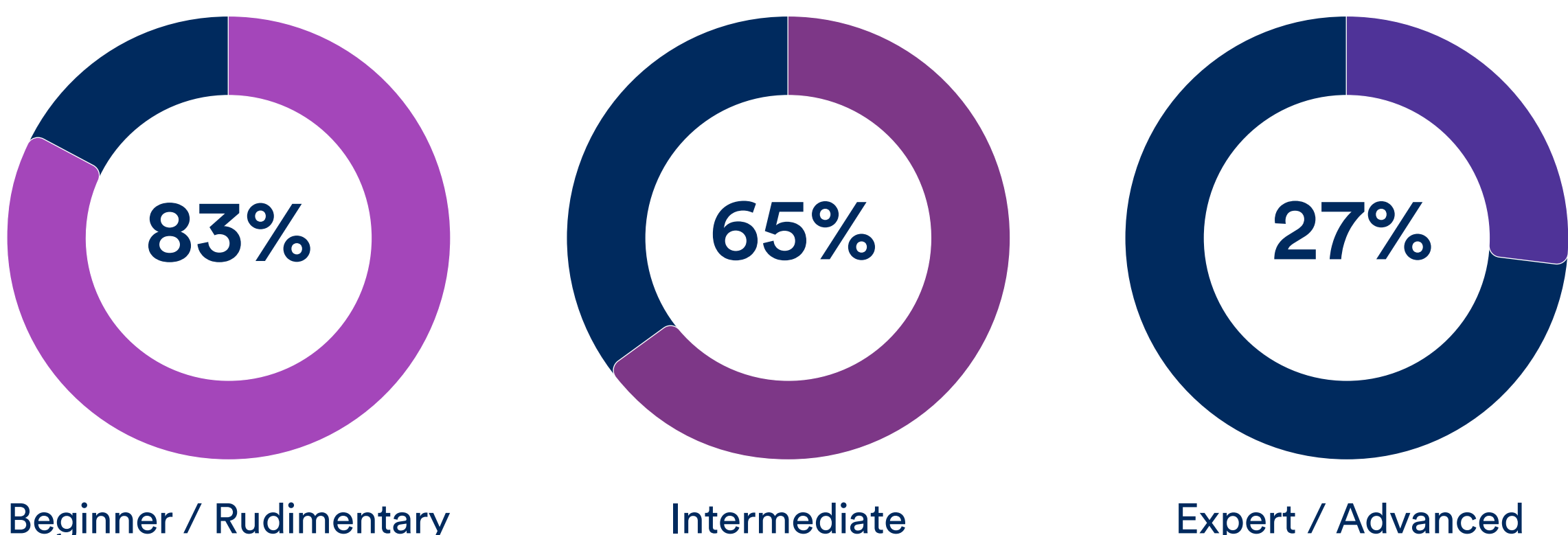
*self purported



But are people in Switzerland as knowledgeable as they think?

People who answered our investment knowledge test question incorrectly

Level of investment knowledge*

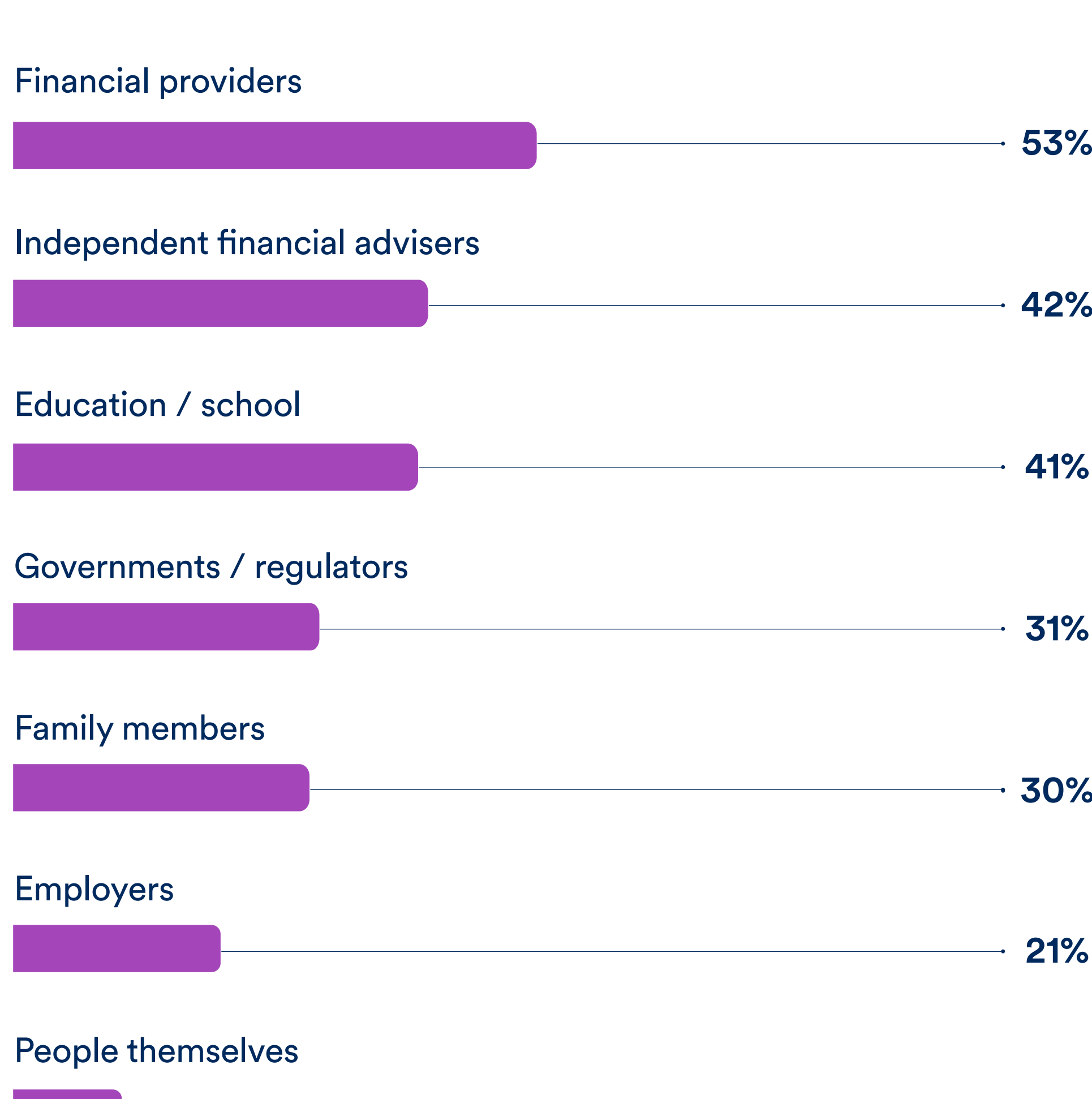


*self purported



Empowerment comes with education, and everyone in Switzerland 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.

Important information:

This information is not an offer, solicitation or recommendation to buy or sell any investment instrument or to adopt any investment strategy. Information herein is believed to be reliable but we do not warrant its completeness or accuracy. Any data has been sourced by us and is provided without any warranties of any kind. It should be independently verified before further publication or use. Third-party data is owned or licensed by the data provider and may not be reproduced, extracted or used for any other purpose without the data provider's consent. Neither we, nor the data provider, will have any liability in connection with the third-party data. The material is not intended to provide, and should not be relied on for accounting, legal or tax advice. Reliance should not be placed on any views or information in the material when taking individual investment and/or strategic decisions. No responsibility can be accepted for error of fact or opinion. Any references to securities, sectors, regions and/or countries are for illustrative purposes only. Schroders has expressed its own views and opinions in this document and these may change.

European Union/European Economic Area: Issued by Schroder Investment Management (Europe) S, rue Höhenhof, L-1736 Senningerberg, Luxembourg. Registered No. B 37.799.

Hong Kong: Issued by Schroder Investment Management (Hong Kong) Limited, Level 33, Two Pacific Place, 88 Queensway, Hong Kong. This material has not been reviewed by the Securities and Futures Commission of Hong Kong.

Indonesia: Issued by PT Schroder Investment Management Indonesia Indonesia Stock Exchange Building Tower 1, 30th Floor, Jalan Jend. Sudirman Kav 52-53 Jakarta 12190 Indonesia PT Schroder Investment Management Indonesia is licensed as an Investment Manager and supervised by the Indonesia Financial Services Authority (OJK). This material has not been reviewed by the OJK.

North America: This content is issued by Schroder Investment Management North America Inc., an indirect wholly owned subsidiary of Schroders Plc, 7 Bryant Park, New York NY 10018-3706. CRD Number 105820. Registered as an investment adviser with the SEC and Portfolio Manager in Canada, NRD Number 12130.

Singapore: Issued by Schroder Investment Management (Singapore) Ltd (Co. Reg. No. 199201080H) 138 Market Street #23-01 CapitaGreen, Singapore 048946. This advertisement or publication has not been reviewed by the Monetary Authority of Singapore.

Switzerland: This document has been issued by Schroder Investment Management (Switzerland) AG, Zurich, a fund management company authorized and supervised by the Swiss Financial Market Supervisory Authority FINMA.

United Arab Emirates: Issued by Schroder Investment Management Limited, located on Level 5, Office 506, Precinct Building 5, Dubai International Financial Centre, PO Box 506612 Dubai, United Arab Emirates.

United Kingdom: Issued by Schroder Investment Management Limited, 1 London Wall Place, London, EC2Y 5AU. Registered No. 1893220 England. Authorised and regulated by the Financial Conduct Authority.