

iShares
by BlackRock

J.P.Morgan

Goldman
Sachs

P I M C O

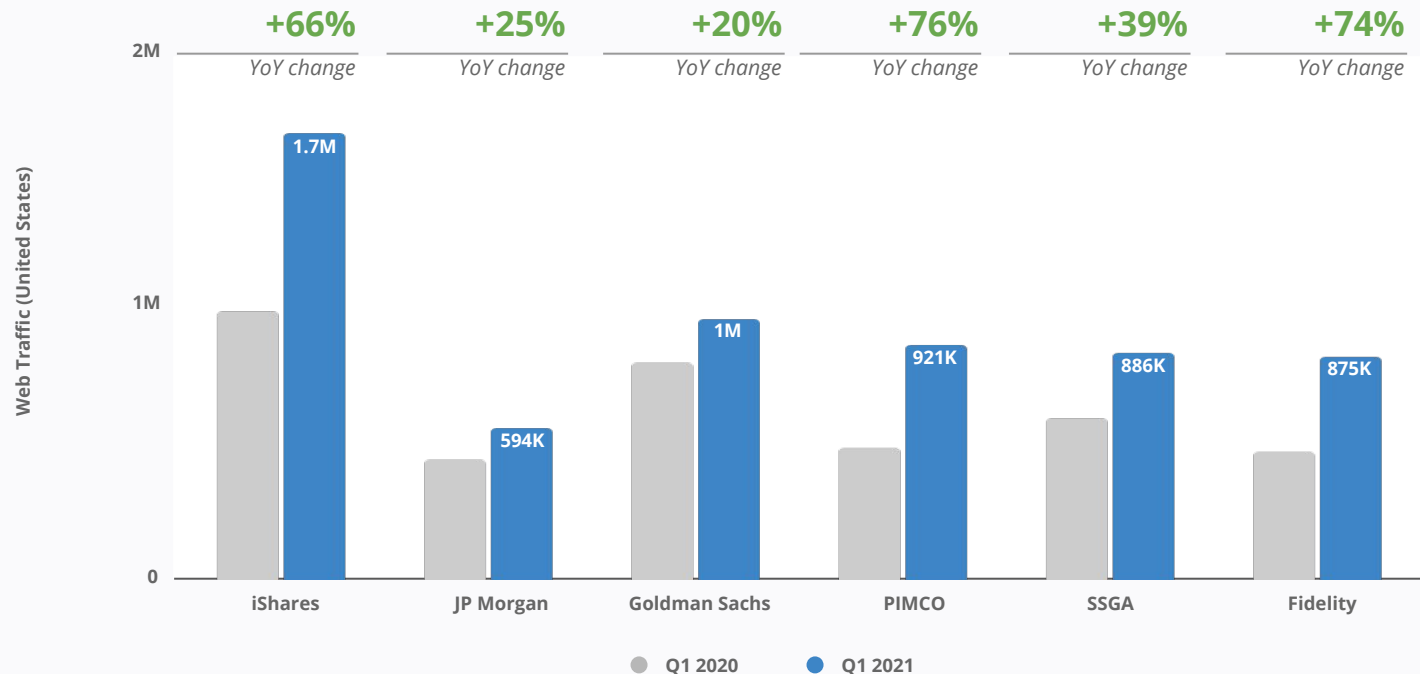
STATE STREET GLOBAL
SPDR[®] ADVISORS

 **Fidelity**
INVESTMENTS

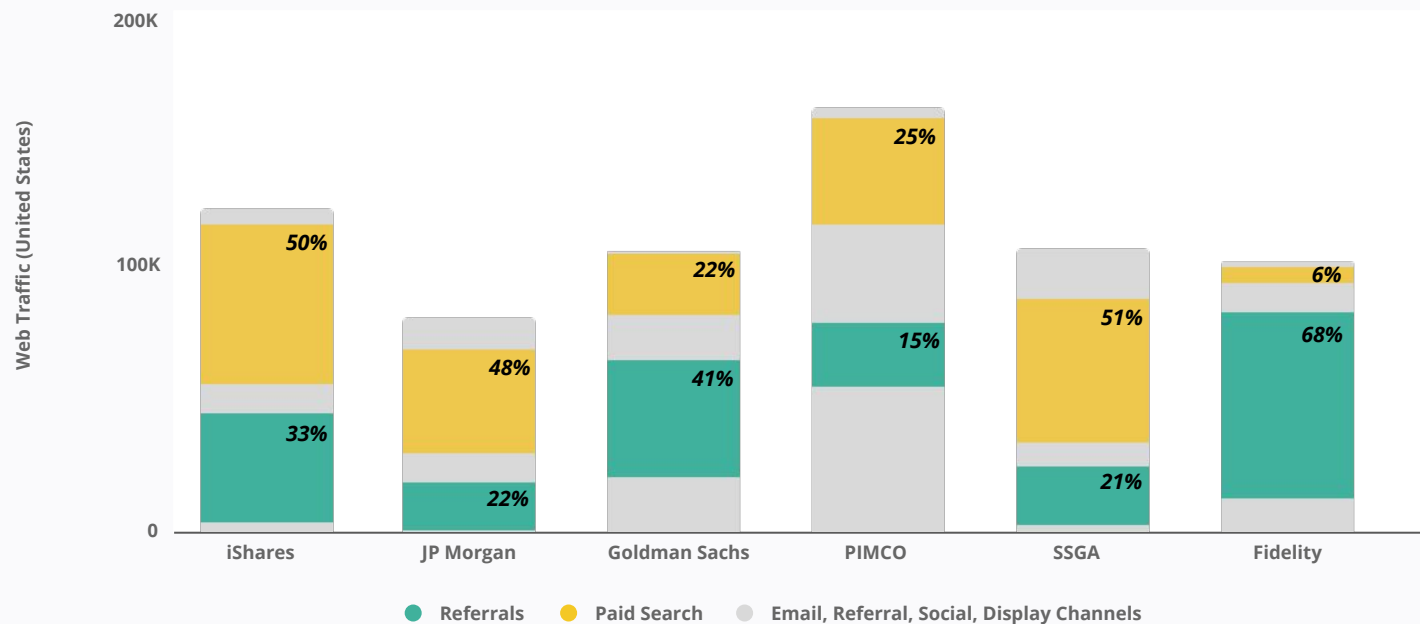
**Using Paid Search, Podcasts &
Email Partnerships to Attract
Financial Advisors**

Financial Services

In Q1 2021, six Asset Management (AM) firms with the largest Assets Under Management (AUM) have increased their web traffic up to +76% YoY.

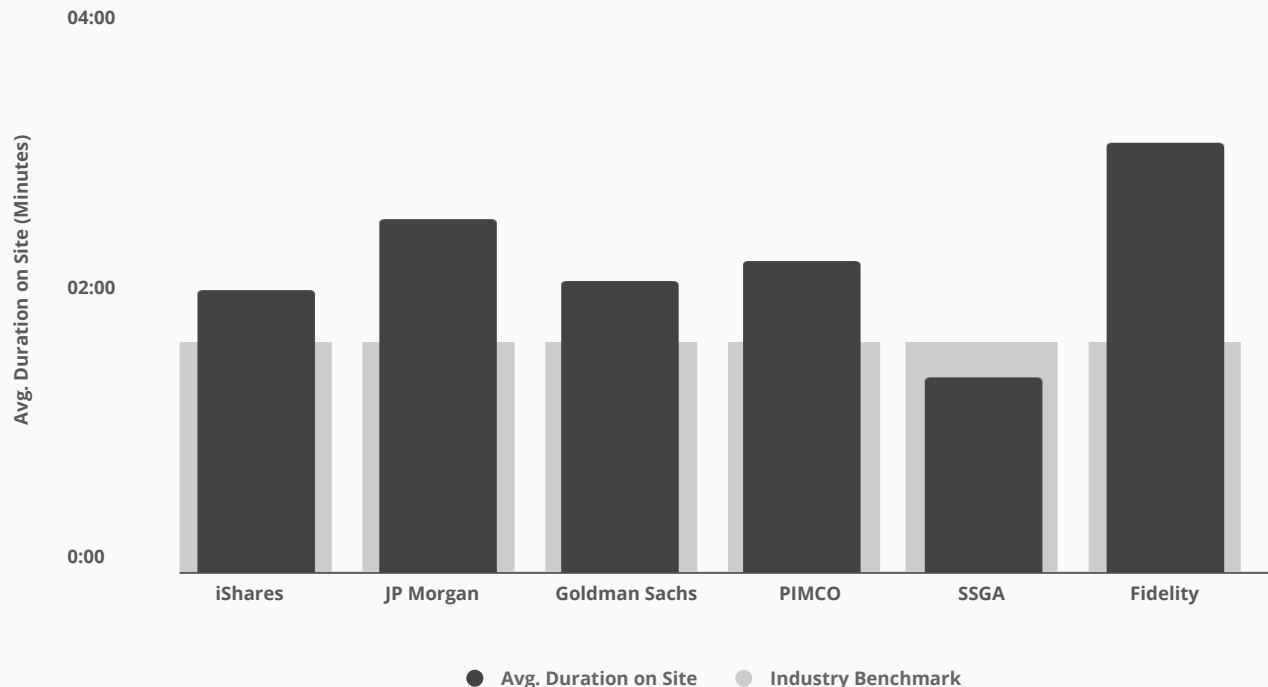


Each respective AM firm has seen a high distribution in average web traffic allocation across Paid Search (34%) and Referrals (33%) in their strategies to reach Financial Advisors (FA) in Q1 2021.



Average Duration on Site

Q1 2021



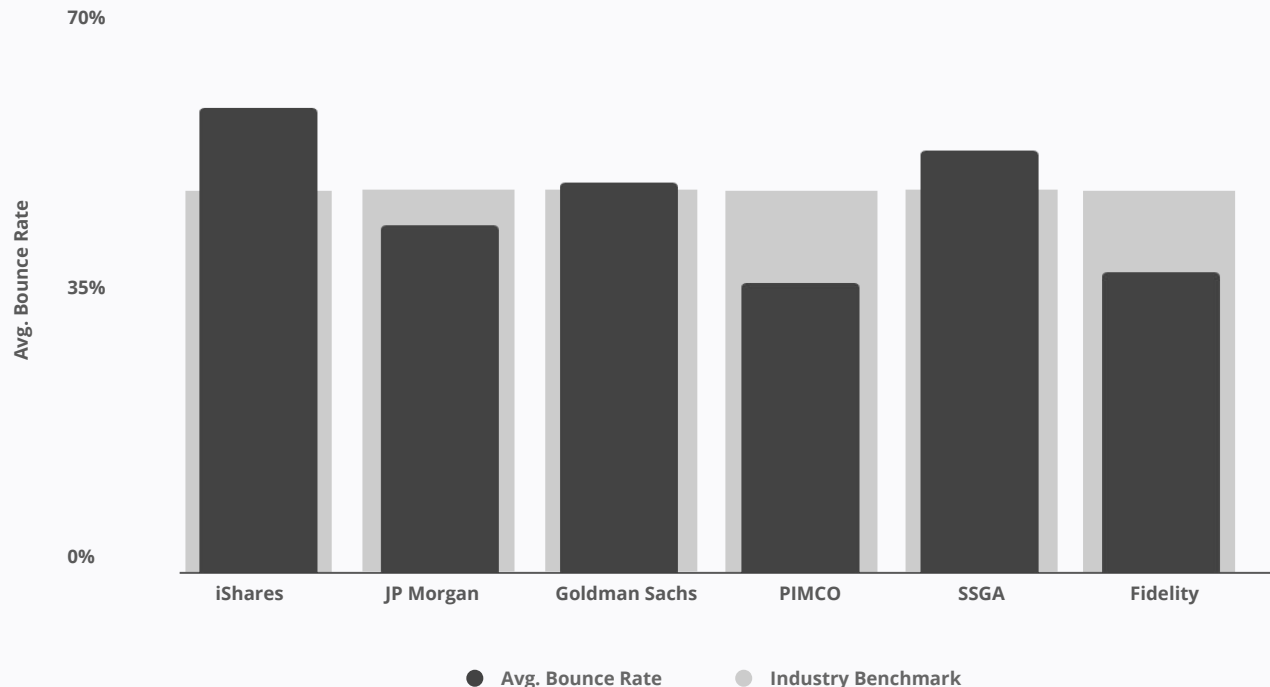
The average visit duration details the amount of time visitors are spending on a site.

The [industry benchmark](#) for financial services currently sits at 01:51.

All firms exceed this benchmark except for SSGA. Fidelity Investments and JP Morgan see the highest durations at 03:38 and 02:51 respectively.

Average Bounce Rate

Q1 2021



The average bounce rate measures the amount of visitors who enter a site and leave immediately without any engagement on page.

The [industry benchmark](#) for financial services currently sits at 51.71%.

Currently only JP Morgan, PIMCO and Fidelity Investments have been able to maintain a lower bounce rate than industry standards.

Visitors on the respective sites are most likely to browse...

Audience Interests

iShares

Topics

1. Investing
2. News
3. Stocks
4. Internet
5. Music
6. Community

Websites

1. etfdb.com
2. etf.com
3. morningstar.com
4. researchgate.net
5. play.google.com
6. udemy.com

J.P.Morgan

Topics

1. Finance
2. Investing
3. Business
4. News
5. Internet Tools
6. Community

Websites

1. blackrock.com
2. wealthcentral.com
3. wealthscape.com
4. medium.com
5. web.whatsapp.com
6. github.com

Goldman Sachs

Topics

1. Banking
2. Career
3. Investment
4. Education
5. Software
6. Technology

Websites

1. wallstreetoasis.com
2. morganstanley.com
3. mergersandinquisitions.com
4. hackerrank.com
5. guru99.com
6. oracle.com

Visitors on the respective sites are most likely to browse...

Audience Interests



Topics

1. News
2. Financial
3. Money
4. Technology
5. Internet
6. Movies

Websites

1. blackrock.com
2. am.jpmorgan.com
3. portfoliovisualizer.com
4. 1point3acres.com
5. kxan.com
6. crunchbase.com



Topics

1. Finance
2. Stocks
3. Etf
4. News
5. Google Tools
6. Search

Websites

1. ishares.com
2. etfdb.com
3. etf.com
4. web.whatsapp.com
5. keep.google.com
6. researchgate.net



Topics

1. Bank
2. Credit
3. Financial news
4. Shopping
5. News
6. Computers

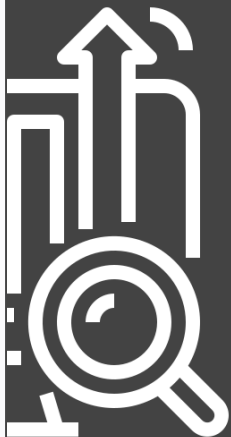
Websites

1. fool.com
2. investopedia.com
3. marketwatch.com
4. gofundme.com
5. aol.com
6. microsoft.com

AM firms are reaching niche audiences to tailor traffic with the following tactics:

1

Paid Search



2

Podcast Content



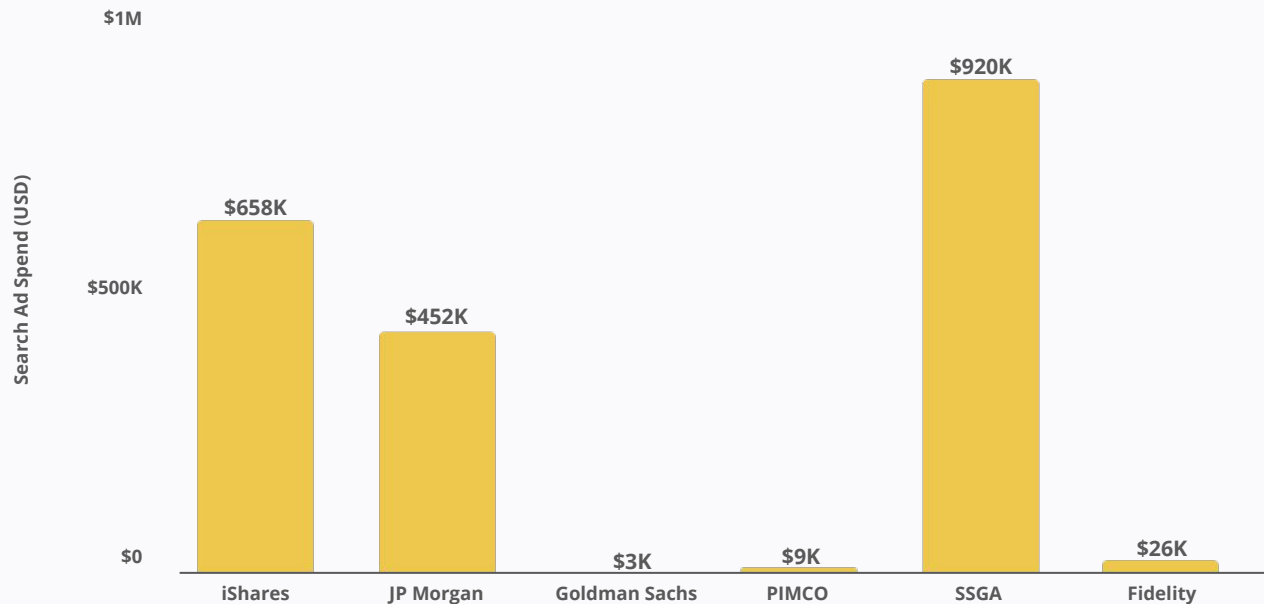
3

Email Partners



Paid Search Spend

Q1 2021



SSGA, iShares and JP Morgan have the highest spends in paid search for Q1 2021.

Top search ads across all competitors feature trends in the financial industry and how to overcome investment challenges.

AM firms have been taking a content approach that highlights their commitment to providing FAs access to top strategy and trends in the financial market.

Strategy & Trends

Overcoming Investment Challenges

J.P. Morgan Asset Management -
Hedge Fund Investments



<https://am.jpmorgan.com/hedge/funds>

Explore Our Investment Strategies. Ideas & Strategies. Podcast Series. Featured Publications.

Keywords:

Investment secrets of a hedge fund manager

Long short hedge fund strategy

Skybridge hedge fund performance

Exchanges Podcast - Goldman Sachs



<http://www.goldmansachs.com/exchanges/podcasts>

Discussing Top Trends Shaping Industries and Markets

Keywords:

Best finance podcasts

Invest like the best podcast

Fidelity Investments - Asset
Allocation Research



<https://institutional.fidelity.com/>

Advisor Services & Practice Management Solutions
You Can Depend On As You Navigate Change.
Fidelity's Comprehensive Method To Asset Allocation
May Help Balance Risk.

Keywords:

Fidelity insights

Fidelity market insights

Fidelity investor vs fidelity insight
and monitor

Top content tactics for Strategy & Trends focused search ads include:

Strategy & Trends

Overcoming Investment Challenges

Tactic #1

Explore Branded Keywords

- JP Morgan and Fidelity Investments target branded keywords of their own funds or competitors to capture people exploring and learning about the funds already.

Skybridge hedge fund performance

Fidelity insights

Fidelity market insights

Tactic #2

Target Forward-Thinkers

- JP Morgan, Goldman Sachs & Fidelity target keywords that capture intent to find strategies or best practices in specific areas of investment.

Invest like the best podcast

Investment secrets of a hedge fund manager

Fidelity investor vs fidelity insight and monitor

Tactic #3

Refer to Benefits/Offerings in Copy

- JP Morgan & Goldman Sachs focus on layering 'strategy' and 'trends' throughout their copy. They also offer resources such as their podcasts and publications.

Discussing Top Trends Shaping Industries and Markets

Explore Our Investment Strategies, Ideas & Strategies, Podcast Series, Featured Publications.

Landing pages for each search ad are clear, concise and represent the message in the copy. The content focuses more on providing information than calling users to action.

Strategy & Trends

Overcoming Investment Challenges

J.P. Morgan Asset Management - Hedge Fund Investments

<https://am.jpmorgan.com/hedge/funds>

Explore Our Investment Strategies, Ideas & Strategies. Podcast Series, Featured Publications.

Exchanges Podcast - Goldman Sachs

<http://www.goldmansachs.com/exchanges/podcas>

Discussing Top Trends Shaping Industries and Markets

Fidelity Investments - Asset Allocation Research

<https://institutional.fidelity.com/>

Advisor Services & Practice Management Solutions You Can Depend On As You Navigate Change. Fidelity's Comprehensive Method To Asset Allocation May Help Balance Risk.

The screenshot shows the J.P. Morgan Asset Management website. The navigation bar includes links for CLIENT REPORTING, UNITED STATES, INSTITUTIONAL INVESTORS, and ENGLISH. The main header features the J.P. Morgan Asset Management logo and a search icon. Below the header, there are links for INVESTMENT STRATEGIES, INSIGHTS, RESOURCES, ABOUT US, and CONTACT US. The main content area is titled "Hedge Funds" and includes a sub-header "J.P. Morgan Alternative Asset Management". The text describes the firm's dedication to developing customized solutions across the liquidity spectrum to help investors achieve their strategic investment objectives. It also mentions a highly selective due diligence process and the team's experience in providing clients with access to both established and emerging managers within an integrated risk framework. The section concludes with "J.P. Morgan Macro Strategies" and a brief description of the team's macro-driven portfolios since 2012.

[Click to view](#)

The screenshot shows the Goldman Sachs website. The navigation bar includes the Goldman Sachs logo and a search icon. The main header features the "Exchanges at Goldman Sachs" logo and a search icon. Below the header, there are links for Insights, Exchanges at Goldman Sachs, and a search icon. The main content area is titled "Exchanges at Goldman Sachs" and includes a sub-header "Exchanges at Goldman Sachs is a podcast where experts from around the firm discuss developments shaping industries, markets and the global economy". The section features a "Latest" list of three podcast episodes, each with a date and a title.

[Click to view](#)

The screenshot shows the Fidelity Institutional website. The navigation bar includes the Fidelity logo and a search icon. The main header features the "Fidelity Institutional" logo and a search icon. Below the header, there are links for Funds & Products, Defined Contribution, Investing, Planning, and Markets & Economy. The main content area is titled "Portfolio Construction for Today's Changing Needs" and includes a sub-header "Your clients' priorities are shifting, and you may increasingly be asked to do more than manage their money". The section features a "Tools & Calculators" link and a "FINANCIAL ADVISORS" link. The "FINANCIAL ADVISORS" link leads to a page titled "REGISTER FOR FULL ACCESS" which describes the benefits of the program.

[Click to view](#)

Top landing page tactics for Strategy & Trends focused search ads include:

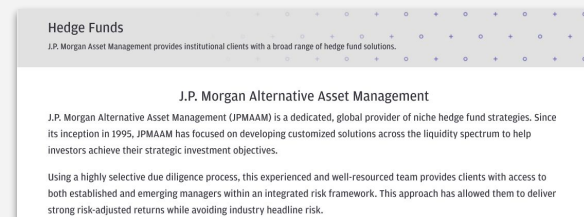
Strategy & Trends

Overcoming Investment Challenges

Tactic #1

Keep it Informative

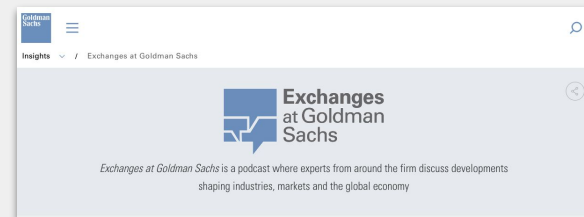
- The content focus must reflect the ad copy. JP Morgan ensured that any strategies identified in the copy are reflected right away on the landing page.



Tactic #2

Take Viewers to the Source

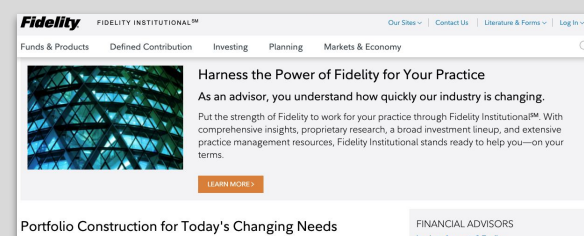
- When specific channels are cited in the ad copy, the landing page demonstrates how viewers can access it. Goldman Sachs takes viewers directly to their podcast.



Tactic #3

Speak Directly to your Desired Audience

- Fidelity Investments talks directly to their audience in their hero banner stating "As an advisor, you understand how quick our industry is changing".



AM firms also allude to the benefit of their funds to help overcome trading obstacles such as risk and diversification.

Strategy & Trends

Overcoming Investment Challenges

PIMCO PIMIX Income Fund - PIMCO Investments LLC 

 <https://www.pimco.com/investing/income-funds>

Designed With Resiliency in Mind to Help Handle Market Challenges. Seek Out Income Generating Opportunities Globally. Learn more. A Global Opportunity Set. Flexible Income Approach. Actively Managed. Meeting Income Challenges.

Keywords:

Pimco income fund returns

Blackrock income opportunities fund

Peak income private income funds

Oasis income fund

iShares® | Core ETFs - Build A Strong Foundation 

 <https://www.ishares.com/core/etfs>

Funds Designed to Help Diversify Portfolios & Reach Investment Goals. See Here. Easy and Efficient. Trusted ETF Leader. Powered by BlackRock. Types: Smart Beta, Country Funds, ETF Education, Bond ETFs.

Keywords:

Wood etf

Aom etf

T bill etf

Core etf portfolio 2018

Gold: Just a Quiet Option? - Think Again - SPDR® Gold ETFs 

 <https://www.ssga.com/>

Gold's Investment Characteristics May Help it Serve Multiple Roles in a Portfolio. Access The Potential Strategic Benefits of Investing in Gold with GLD® and GLDMSM.

Keywords:

gdxj

gdxj stock price

nyserca gdx

jnug news

Top content tactics for Overcoming Investment Challenge search ads include:

Strategy & Trends

Overcoming Investment Challenges

Tactic #1

Explore Branded Competitor Keywords

- PIMCO focuses on targeting key competitor funds to capture people with intent to find other income funds and land on theirs.

Blackrock income opportunities fund

Peak income private income funds

Oasis income fund

Tactic #2

Target Specific ETFs

- iShares & SSGA find people already doing research about their ETFs and direct them to a desired landing page to help convert them.

Wood etf

gdxj

Aom etf

Tactic #3

Use Verbiage to Indicate Flexibility in your Funds

- Using strong copy that offers actionable solutions to real challenges is threaded throughout PIMCO, iShares & SSGA's ad copy.

Designed With Resiliency in Mind to Help Handle Market Challenges. Seek Out Income Generating Opportunities Globally. Learn more. A Global Opportunity Set. Flexible Income Approach Actively Managed. Meeting Income Challenges.

Landing pages for ads addressing obstacles speak to the viewer with actionable prompts, allowing them to see how their funds can play a role in their portfolios.

Overcoming Investment Challenges

Designed With Resiliency in Mind to Help Handle Market Challenges. Seek Out Income Generating Opportunities Globally. Learn more. A Global Opportunity Set. Flexible Income Approach. Actively Managed. Meeting Income Challenges.

Funds Designed to Help Diversify Portfolios & Reach Investment Goals. See Here. Easy and Efficient. Trusted ETF Leader. Powered by BlackRock. Types: Smart Beta, Country Funds, ETF Education, Bond ETFs.

Gold's Investment Characteristics May Help it Serve Multiple Roles in a Portfolio. Access The Potential Strategic Benefits of Investing in Gold with GLD® and GLDM™



Top landing page tactics for Overcoming Investment Challenge search ads include:

Strategy & Trends

Tactic #1

Include a Call to Action

- After providing sufficient information, iShares gives viewers the option to access a portfolio builder with the button “Build Now”.

Tactic #2

Keep it Consistent & Repetitive

- SSGA's ad copy states “Gold: Just a Quiet Option?” which is directly mirrored throughout the landing page to keep viewers on track with their message.

Tactic #3

Use Clean & Strong Imagery

- PIMCO sets a colourful and strong image as the first thing viewers see coming from their ad to create a professional impression and build credibility.

Overcoming Investment Challenges

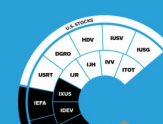
iShares Core ETFs help investors focus on what matters most – a strong portfolio foundation. A strong foundation is built for the long term and diversified enough to withstand whatever comes next.

Our Core ETFs are a select group of broad stock and bond **exchange-traded funds** designed to work together in a tax-efficient way to help meet any financial goal. **Explore** how tax-efficient portfolios help investors keep more of what they earn.

USE OUR CORE PORTFOLIO BUILDER TOOL

See how iShares Core ETFs can work together in a portfolio.

BUILD NOW >



STATE STREET GLOBAL
SPDR

ETF Finder Insights Investment Capabilities Resources About Us

Investment Capabilities

Think Gold Is Just a Quiet Option? Think Again.



Hear From Our Experts

Guest
Gold as a Strategic Asset Class
May 11, 2020

PIMCO

Find Your PIMCO Content Contact Us Access My Account Log In or Register

INVESTMENTS INSIGHTS EXPERTS RESOURCES OUR FIRM FINANCIAL PROFESSIONALS

SEARCH

Morningstar Upgrades PIMCO Income Fund to Gold

"The strategy has posted long-term returns among the category's best, with modest volatility. It has been as or more resilient in other times of stress, too."

LET'S DISCUSS INCOME



AM firms are reaching niche audiences to tailor traffic with the following tactics:



As a rising advertising model, podcasts offer AM firms the opportunity to find very niche markets of listeners to promote to. Podcast show verbiage and topics are catered to professionals who would be able to understand and engage with the terminology easily.

**iShares**

Seeking Alpha
"Let's Talk ETFs"

Subscribed: **592**
Played: **11.3K**

Collaboration Type

Bob Hum, the Head of Factor ETFs at BlackRock (iShares) sat down with the podcast "Let's Talk ETFs" to discuss factor investing.

He offers actionable insights and tips that advisors and others can apply.

**PIMCO**

netwealth
"The Portfolio Construction Podcast"

Subscribed: **23**
Played: **1.1K**

Collaboration Type

Brian Leach, a Credit Strategist at PIMCO joins the netwealth podcast to discuss the government's efforts during the global pandemic.

He offers insights on the best ways to position portfolios with the current events.



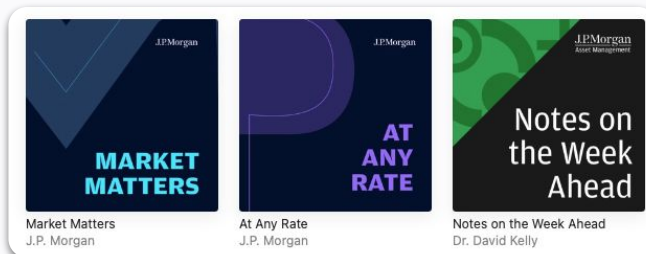
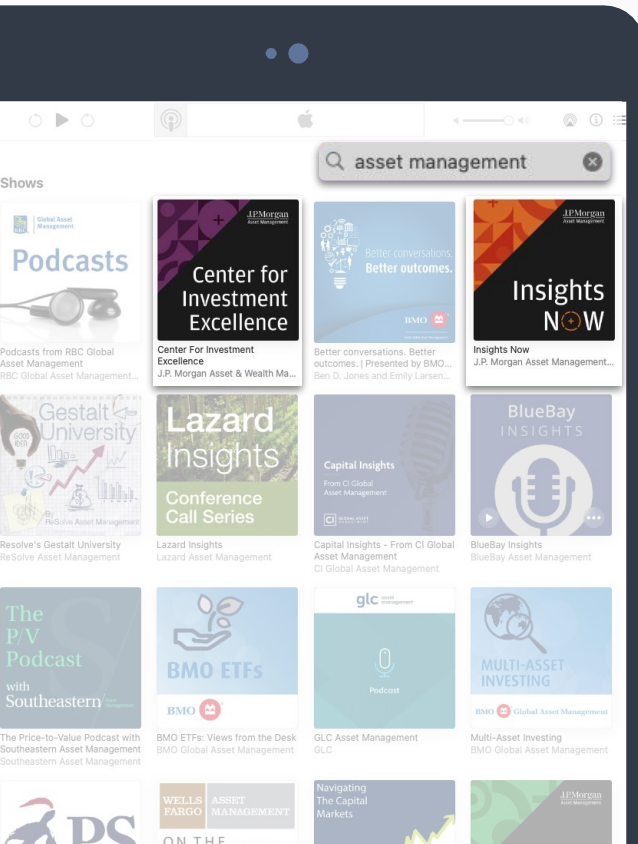
The Atlantic
"The Future According to Now"

Subscribed: **1K**
Played: **4.2K**

Collaboration Type

Fidelity Investments sponsored the creation of a podcast series with The Atlantic called "The Future According to Now". Each episode is written by The Atlantic and is promoted in unison with Fidelity articles that are relevant to the show topic.

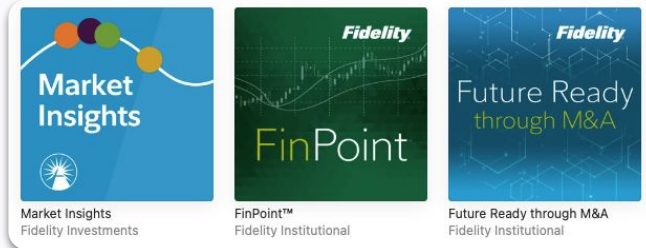
Several AM firms have also built their own podcast production. Distributing podcasts enables visibility on 3+ platforms including Spotify, Apple Podcasts and Google Podcasts.



Tactic #1

Maintain Branding

Create a brand for your Podcasts and ensure the covers are cohesive.



Tactic #2

Target Keywords

When writing descriptions & titles, make sure to target keywords advisors would be searching for.

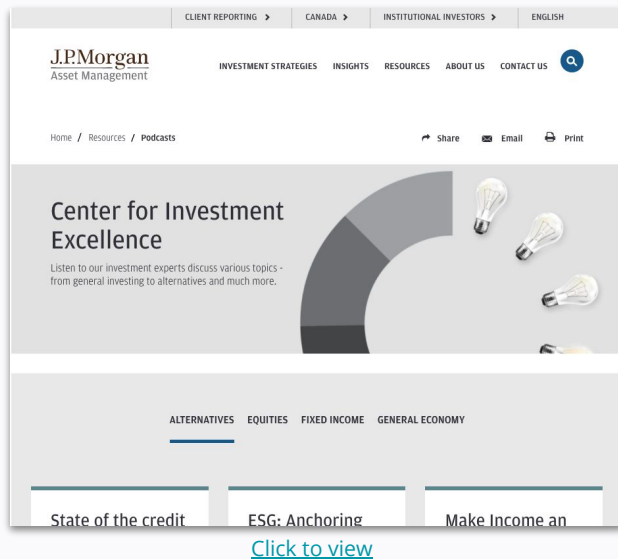


Tactic #3

Click-through Opportunities

Make sure Podcast Show and Episode descriptions feature a click-through link to a relevant site.

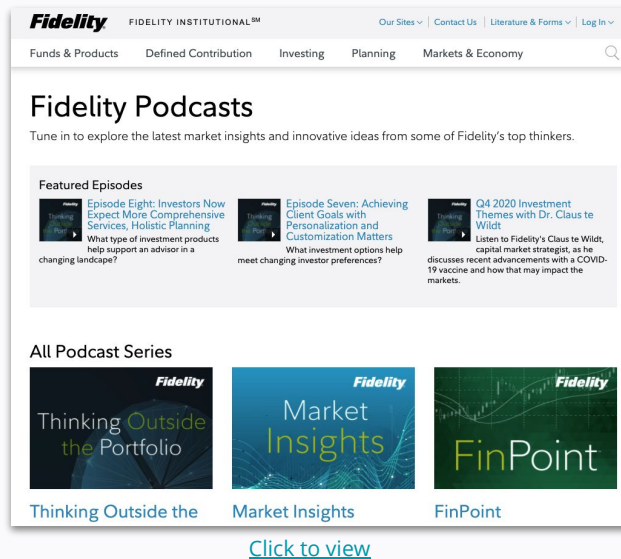
Podcasts also live on landing pages hosted by the AM firm to give website visitors easy access to the shows while browsing.



Tactic #1

Offer Content Options

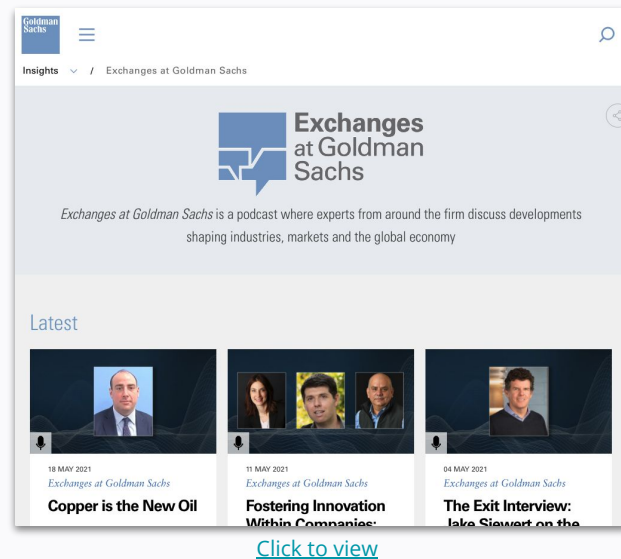
JP Morgan ensures that visitors can easily filter through podcast options such as "Alternatives", "Equities", "Fixed Income" and "General Economy".



Tactic #2

Define Your Podcasts

Fidelity Investments directs viewers to this page if they are on the 'institutional finance' or 'advisor view'. This helps the audience feel the content is curated for them.



Tactic #3

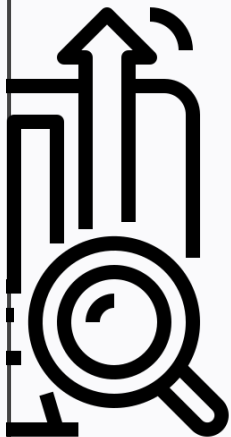
Create 'Feature' Episodes

Build a system to make episodes accessible as soon as a visitor enters the page. Goldman Sachs ensures 'Latest' podcasts show up at the top.

AM firms are reaching niche audiences to tailor traffic with the following tactics:

1

Paid Search



2

Podcast Content



3

Email Partners



FINANCIAL ADVISOR **IQ** sponsored by **iShares** by BlackRock



Pursuing Income Through High Yield Bond ETFs

For advisors looking to generate income in their clients' accounts, high yield bonds may be an answer, so long as clients don't overpay for the exposure.



Seeking Efficiency by Barbell Your Bonds

When building a bond portfolio in a low-rate environment, advisors should be wary of active funds that charge high fees for benchmark-hugging exposures.

[Click to view](#)

COVID-19: Insights Beyond the Curve APPLICATIONS FOR PEOPLE AND INVESTING **ETF TRENDS** DAILY NEWSLETTER | MAY 10, 2021 **Fidelity**



An Advisors' Guide to Buffered/Defined Outcome ETFs

Buffered ETFs, which promise investors some downside protection when markets fall, have been around for a few years now. Also known as defined outcome or structured outcome ETFs, these funds experienced a real-world test in the first quarter of 2020, when the coronavirus pandemic slammed markets and... [READ MORE »](#)



The End Of The Bubble Is Near

[Click to view](#)

STATE STREET GLOBAL ADVISORS SPDR®

Mid Caps: Historical Pattern of Outperformance

Learn how mid-cap stocks managed to outperform both larger and smaller firms during the last three systemic crises in our latest whitepaper.

[Download Now](#)

Mid Caps Defy Conventional Wisdom in Crisis and Recovery

Matthew J. Bartolini, CFA
Head of SPDR Americas Research

[Click to view](#)

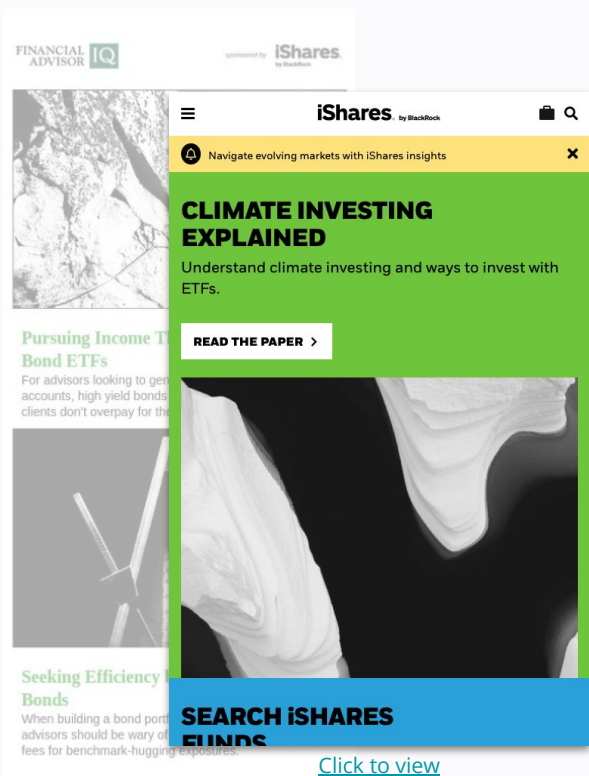
Financial publications with niche and targeted audiences often host email newsletters that are blasted to their audience regularly.

These newsletters are often part of people's daily routines and have strong [credibility](#) with their audiences. AM firms use these publications to build visibility and referrals back to their webpages.

Frequently advertised publication emails include:

[Financial Times](#)[Financial Advisor IQ](#)[Advisor Perspective](#)[ETF Trends](#)

The email ad landing pages often expand on the original feature in more detail and include clear CTAs to learn more about the company or their research.

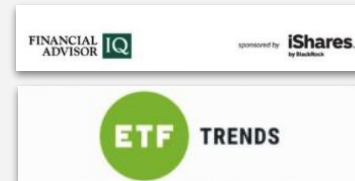


Top email partnership tactics include:

Tactic #1

Choose Niche Partners

- Look into financial publications and see if the content relates to financial advisors as something they would be reading and deriving use from.



Tactic #2

Choose Mindful Content

- Fidelity Investments and SSGA both created research papers on specific topics in current events that viewers who click through can download and learn more about.

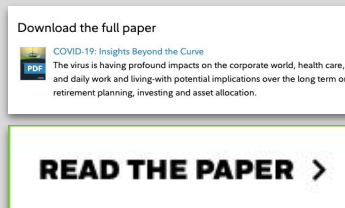
Uncover Mid Caps'
Overlooked Value

COVID-19: Insights Beyond the Curve

Tactic #3

Use Clean Design & Strong CTAs

- Use strong CTAs in your emails that are followed through with clean website designs that are easy to navigate.



Key Takeaways

Finding the Right Audience: Some of the top Asset Management firms with the highest AUMs have seen a high percentage of traffic to their sites through paid search and referral marketing apart from direct and organic search. They have managed to maintain high average duration times on their websites as well as low bounce rates for visiting customers. These firms have managed to build audiences with interests and psychographics matching financial investors and advisors through:

- **Paid Search Ads:** AM firms tend to create content that supports strategic thinking or actionable solutions to portfolio problems. Branded competitor keywords are often used as well as specific fund names. Long-tail intent based keywords are targeted to reach advisors searching for strategy and trends in finance. The ad content is straightforward and clear. It uses verbiage that indicates solving problems, building strong portfolios and learning investment tactics.
- **Podcast Content:** AM firms are engaging with podcasts in two ways - through collaborations with other podcasts and by building their own. Collaborations often feature AM team members joining as guests to share information and ideas or through the promotion and sponsorship of other podcasts. AM firms are also producing their own content to build out a library of shows that users can access at any time or through targeted podcast searches.
- **Email Partnerships:** Using niche publications that financial advisors are sure to be reading is a tactic many AM firms are using. Ad placements, sponsorships or email takeovers can be organized to get into the inboxes of thousands of readers who look forward to this content everyday. Often detailed papers or research are presented as promotional content to entice readers to click-through and learn more.

Keeping Your Audience Engaged: A variety of landing pages have been tested from paid search ads, podcasts and email partnerships. To employ the main tactics represented, keep your landing page:

- **Clean & Clear:** The first thing viewers land on should be well designed, easy to read and navigate. Accent colours, imagery and clean text should be used to address any content on the page.
- **Accessible:** Make it easy for visitors to find different filters within the landing page as well as different pages in your navigation. Use bold imagery and buttons for your calls to action so that viewers can easily access information that will help them with their decisions.
- **Consistent with Promotion:** Ensure consistency and tasteful repetition with ad copy and landing page headlines. This will assure the viewer that they are reading content they wanted to access and ultimately will help lower bounce rates.