



For Immediate Release

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## Five Firms Earn High Honors in DALBAR's Analysis of Performance Reports

(Marlborough, MA. May 22, 2018) Performance reports are crucial tools in telling the tale of how accounts have performed and five firms stood out during DALBAR's recent study, *Trends and Best Practices in Performance Reporting*, which identifies and assesses the factors that help clients understand their portfolios. Merrill Lynch topped the list by a considerable margin and easily proved itself to be the leader in illustrating clients' investment performance.

"We are delighted that DALBAR ranked Merrill Lynch first in its ranking of performance reporting. We view this ranking as a reflection of our commitment to straightforward and clear communication with clients and to providing the finest client service anywhere," said Andy Sieg, head of Merrill Lynch.

The best performance reports include detailed analysis of both the account and individual investment level as well as asset class allocation breakdowns. Industry-leading performance reports segment this data in ways that anticipate potential client questions, providing a complete picture of the client's account and individual investment performance.

These tools can help advisors and clients compare actual portfolios against target allocations, investment objectives and goals. Thorough performance reports identify potential or existing misalignments, alerting clients to mis-allocations or other issues that do not line up with their desired strategies. Performance reports put that extra detail in the hands of the investor that the account statement cannot, DALBAR said.

The following companies are the top five in the industry due to their truly remarkable performance offerings:

Rank	Company
#1	Merrill Lynch
#2	InvestEdge
#3	Advent Black Diamond
#4	Morgan Stanley
#5	Pershing

DALBAR analyzed performance reports based on over 100 data points within five main categories: Investor Information and Support, Allocations, Performance and Risk, Security Details and Design and Format.

For more information about DALBAR's *Trends and Best Practices in Performance Reporting*, please contact Jared Licklider at [jlicklider@dalbar.com](mailto:jlicklider@dalbar.com).



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