

# NAVIGATING THE EVOLVING MARKETING LANDSCAPE

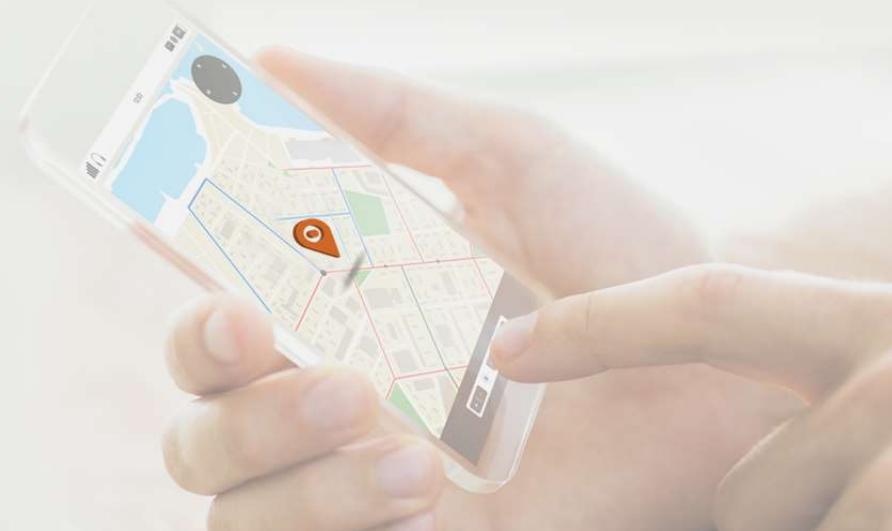
2016  
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# NAVIGATING THE EVOLVING MARKETING LANDSCAPE

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## Developing a Marketing Organization to Power an Engaging Blog



Anu Heda, Partner

Many marketing teams have snapped on ancillary capabilities to place content into a blog. The industry leaders have taken a different approach to build Marketing around relevant thought leadership that utilizes the blog as the primary platform to transfer the thought leadership to clients and prospects. Attend this session to understand the necessary “basics” for a relevant and well-executed blog.





# **Developing a Marketing Organization to Power an Engaging Blog**

November 8, 2016

# Agenda

Introductions

The Basics of a Great Blog

Organizing a Team

Conclusion

# Who is Naissance?

- 2-Person Consulting Firm
- Only Asset Management
- Only Marketing
- Clients Include 14 of Top-20 (AUM)
- Reviewing Industry Blogs For 5 years
  - 2010 – 5 blogs monitored weekly
  - 2015 – 40+ blogs



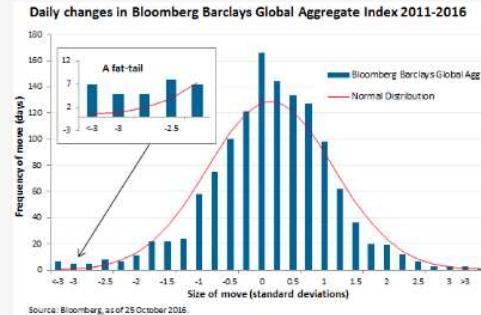
## BEST BLOGS OF THE WEEK #248

Posted by [Anu Heda](#) on Oct 31, 2016, in [Best Blogs of the Week](#), tagged with [Columbia Threadneedle](#), [JPMorgan](#), [Loomis Sayles](#), [Vanguard](#) • Share

1 election post. That is all I will bring you. Promise. Overall here are the four most engaging posts from the last three weeks.

*Columbia Threadneedle* – [Election 2016: Lifting the cloud of uncertainty](#) – Changes to tax policies are likely regardless of who wins in November. But it's questionable how much change can actually be effected considering an expected divided government even if Trump wins.

*JPMorgan* – [Fatter tails and endogenous risk](#) – Although endogenous risks are difficult to quantify, there are ways to recognize and mitigate them. Analysis of flow data and correlation can provide insight into crowding and cross asset dynamics. Stress testing can help quantify potential tail losses, and hedging via non-linear products such as options can help protect against the risks.



*Loomis Sayles* – [Global Growth Themes and Forecast \(Infographic\)](#) – We're in a "lower for longer" bond yield environment as inflation in advanced economies decelerates and major central banks—the Bank of England, European Central Bank and Bank of Japan—pursue quantitative easing (QE).

*Vanguard* – [Good grief! They're commoditizing index investing again](#) – While it may be tempting to think that the same application of technology can displace the human element of running an index fund, we have not seen that disruption and probably never will. Indeed, people remain one of the most critical differences across providers.

# What is a Blog?

Online place for frequently updated, written, short-format thought leadership (relatively) adding to the readerships' knowledge

- Discuss varied “financial” topics
- Cover all “investment” topics
- Support audience on one topic
- Focus on one client segment
- Showcase single thought leader

The screenshot shows a blog page with a header 'The think' and a date 'OCTOBER'. The first article is by Jesper Koll, dated 11/01/2016, titled 'Yes, BOJ Policy Is Working—Credit Cycle Up and Zero for Long'. It discusses the success of the Bank of Japan's policy. The second article is by Jeremy Schwartz, dated 10/31/2016, titled 'Tech vs. Utilities: Which Is a Better Income Strategy?'. It compares technology and utility stocks. The third article is by Jeremy Schwartz, dated 10/28/2016, titled 'Why This EM Strategy Reduced Exposure to Brazil and Taiwan'. It explains a strategy for emerging markets.

Usually focused on timely market events, investment situations and geopolitical issues

# Why Maintain a Blog?

- Nobody wants 12-page whitepapers *anymore*

The image shows a whitepaper cover for MSCI. At the top left is the MSCI logo. To the right, the text 'Research Insight' is written. The main title 'Is Your Risk Model Letting Your Optimized Portfolio Down?' is centered. Below the title is a subtitle 'Pitfalls in Portfolio Construction and MSCI Innovations for Overcoming Them'. Underneath the subtitle are the names of the authors: 'Jyh-Huei Lee, Oleg Ruban, Dan Stefek, Jay Yao'. Below the authors' names are four email addresses: 'Jyh-Huei.Lee@msci.com', 'Oleg.Ruban@msci.com', 'Dan.Stefek@msci.com', and 'Jay.Yao@msci.com'. At the bottom of the cover is the date 'August 2012'. A small 'Abstract:' section is present at the bottom, followed by a brief description of the paper's content.

MSCI

Research Insight

Is Your Risk Model Letting Your Optimized Portfolio Down?

Pitfalls in Portfolio Construction and MSCI Innovations for Overcoming Them

Jyh-Huei Lee, Oleg Ruban, Dan Stefek, Jay Yao

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[Dan.Stefek@msci.com](mailto:Dan.Stefek@msci.com)  
[Jay.Yao@msci.com](mailto:Jay.Yao@msci.com)

August 2012

Abstract:  
 This paper addresses the concern that some risk models used in optimization may not be forecasting risk accurately, or may be creating suboptimal portfolios. We review pitfalls in portfolio construction and explain how MSCI's best practices in model building are designed to overcome these challenges.

- Need *remains* to showcase thought leaders and internal insights
  - Preference for bullets
  - Short format reduces 'commitment'

## What's the “best” industry blog?

Helping Advisors Blog

About Author Bios Related

### No single best, but...

Economic indicators dashboard – September 2016 – Economic resilience

## Economic Indicators Dashboard

THE STATE OF THE ECONOMY



Overall, the Economic Indicators Dashboard reflects a resilient U.S. economy on the eve of the U.S. election and November Federal Reserve meeting.

[Read more...](#)

October 27, 2016 Linda Hitchcock  Economic Insights

 3 Votes

# Agenda

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# How Many Blogs For Your Firm?

- Start with 1, unless you are ...

The screenshot displays the Vanguard Blog website, which is divided into two main sections: **Vanguard Blog for Institutional Investors** and **Vanguard Blog for Advisors**.

**Vanguard Blog for Institutional Investors:** This section features a post by John Woerth from October 31, 2016, titled "Thank you, Bond Market". The post discusses the challenges faced by bond investors. Below the post are social sharing icons for Facebook, Twitter, LinkedIn, Google+, and RSS. The sidebar on the left shows a recent post by Josh Barrickman.

**Vanguard Blog for Advisors:** This section features a post by Bill McNabb from October 27, 2016, titled "A guide for clients in an uneasy world". The post discusses market uncertainty and its impact on clients. Below the post are social sharing icons for LinkedIn, Twitter, Google+, Facebook, Email, and Print.

The top navigation bar includes links for Home, Economy & markets, Investing, Personal finance, Retirement, Taxes, College, a search bar, and a "Filter by" dropdown. The footer of the main content area includes links for Economy & Markets, ETFs, Portfolio Construction, and Wealth Management.

## How Frequent? How many Authors?

Manager	October	Authors	Typical Post Title
AB	14	15*	REITs Review: Looking Beyond the Price Tag
American Century	12	12	Global Bond Outlook: Post-Brexit and Pre-U.S. Election
BlackRock	19	9	3 reasons to like emerging markets despite election noise
Lord Abbett	6	3	The Maze of Inheriting Multiple Retirement Accounts
M & G	9	7	Good things come to those who wait – a look into valuations of USD long-dated credit
SSgA	17	5	4 Macro Factors Supporting the Rebound in Emerging Markets
TIAA	13	7	Investing for impact
Van Eck	12	5	Coking Coal Rally Driven by Supply Constraints
Weitz	3	2	Don't Play In the Street: Equity, Even in Fixed Income
Wisdom Tree	23	12	How Earnings Indexes Are Becoming Important Diversifiers

## Should I Mention Product?

Given faltering global growth, as projected by the [International Monetary Fund](#), it may be prudent to look for sectors that are less commodity- or old economy-oriented.

**Positioning in Areas of Earnings Strength:** We believe that exposure to EM Consumers, Information Technology and Health Care—driven by supportive population demographics, a growing middle class and innovation—will help drive the earnings recovery in the years ahead.

- The [WisdomTree Emerging Markets Consumer Growth Index \(WTEMCG\)](#), through its growth and quality tilts, offers access to the new economy sectors in EM.
- While the MSCI Emerging Markets Index has experienced an earnings contraction of almost 23%, WTEMCG saw its earnings contract by only 1.5%. The ability to maintain its earnings growth while the MSCI EM Index experienced a large contraction in earnings is testimony to the strength of the consumer-related sectors in the EM block.
- Further, WTEMCG is designed to exclude the Energy and Materials sectors, so there is zero weight to those two sectors. Industrials, which can be influenced by commodity price cycles, is also a small weight in WTEMCG. As a result, the three sectors with the biggest earnings declines are 21.8% weight in the MSCI EM Index but only 3.2% weight in WTEMCG.
- It comes as no surprise that WTEMCG has been able to showcase relative strength in earnings growth. This index is designed to help investors gain access to areas of the markets that have strong:
  - Growth characteristics, through three- to five-year forward-looking earnings growth estimates
  - Quality characteristics, measured by [return on equity \(ROE\)](#) and [return on assets \(ROA\)](#)—which together give the investor an idea of leverage used in a company's operations

# Case Study: BREXIT

Asset Manager	Post Title
American Century	<a href="#">Our Views on the Brexit Vote</a>
BlackRock	<a href="#">What data can tell us about the Brexit vote / 5 key takeaways from the Brexit vote</a>
Fenimore	<a href="#">Brexit &amp; The value of patience</a>
Franklin Templeton	<a href="#">In The Know: The UK Votes to Leave the EU / Brexit: How Quickly May the Surprise Wear Off? / A Global Macro View of Brexit Implications</a>
Invesco	<a href="#">UK votes for 'Brexit'</a> <a href="#">Beyond Brexit: What happens next?</a>
M & G	<a href="#">Bond market reaction to UK "Leave" vote</a>
MFS	<a href="#">Brexit Rattles the Market</a>
Natixis	<a href="#">Brexit Interviews: Implications of the vote / Brexit Vote: The New Unknowns</a>
PIMCO	<a href="#">Brexit: Initial Impact and the Road Ahead / Brexit's Impact on the Eurozone</a>
TIAA	<a href="#">Response to Brexit requires long-term perspective – UPDATED</a>
Wells Fargo	<a href="#">Brexit: Buy the dip, or wait? / Brexit vote sends shock waves through markets</a>
William Blair	<a href="#">Brexit Update: Our Base Case Scenario</a>
WisdomTree	<a href="#">Sterling's Structural vs. Euro's Political Weakness: "Brexit" Opens Opportunities</a>

# Agenda

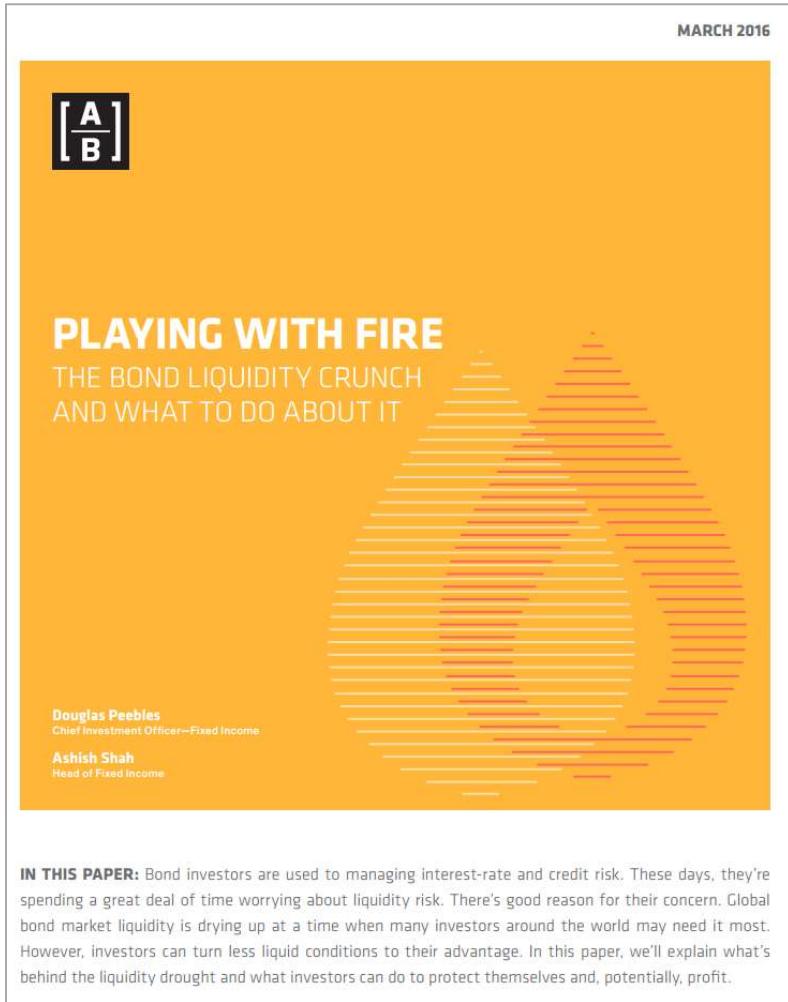
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# Old Whitepaper Model Will Not Work



## Whitepaper Facts

- 16 pages
- 10 charts and tables
- Explores technicalities such as gross leverage ratio, asset sales' correlation

1. Long Production Cycle
2. Highly Technical
3. Usually Slow

Potentially add components into blog calendar but do not build a calendar around whitepapers

## Three Viable Production Models in Practice Today

	1 – Assign to a single person	2 – Ghost Writing Team	3 – Integrated Marketing
Requirements	<ul style="list-style-type: none"> <li>▪ Long-term commitment</li> <li>▪ An interesting writer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Internal acceptance</li> <li>▪ Clear style guide and requirements</li> </ul>	<ul style="list-style-type: none"> <li>▪ Long-term commitment</li> <li>▪ Resources from Client Portfolio Management, Marketing, and Sales</li> </ul>
Benefits	<ul style="list-style-type: none"> <li>▪ Usually fast</li> <li>▪ Easy to keep <i>on brand</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ Easy to ramp up/down volume</li> <li>▪ Low impact to investment team</li> <li>▪ Opportunity to outsource</li> </ul>	<ul style="list-style-type: none"> <li>▪ Authentic voice of the firm</li> <li>▪ Naturally aligned content to investment team events and institutional meetings</li> <li>▪ Flexibility to include or exclude investment teams</li> </ul>
Dangers	<ul style="list-style-type: none"> <li>▪ Key person risk</li> <li>▪ Potential to become too uniform</li> </ul>	<ul style="list-style-type: none"> <li>▪ Can feel disingenuous</li> </ul>	<ul style="list-style-type: none"> <li>▪ CPM teams without editorial background</li> <li>▪ Misalignment between Sales and CPM</li> </ul>

- Ideation pipeline can be detached (to some degree) from production
- Each post written by single author
- Graphic and chart concepts via writer to design team

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## 5 Points

- 1** Start with a single blog
- 2** Expect to post 2+ times weekly
- 3** *Don't extend, merchandise, activate* your long-format whitepapers via blog posts
- 4** Be ready for off-cycle content
- 5** Ideation is difficult and likely to evolve

Questions?

# Thank You



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