

### News

## PLATFORMS PROBLEMATIC ON DIRECT SHARES

By [Mike Taylor](#) on 11 July 2011 [0 comments](#)

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Self-managed superannuation fund (SMSF) trustees may be better placed than some advisers with respect to share trading.



According to a new report released by research company Investment Trends, financial planners have indicated platform providers are not delivering well enough on their direct share offerings, with planner satisfaction remaining flat in 2011.

Investment Trends' 2011 Planner Direct Equities Report found more than one-third of financial planners preferred platforms over stockbrokers for direct share trading, but only 16 per cent of users rated the offering as 'very good'.

According to investment analyst Recep Peker, platforms have improved satisfaction by fixing some of the shortcomings identified in previous surveys, but new gaps were fast emerging — particularly in areas around shares research, timeliness of data and pricing.

"We are also finding that planners are increasingly open to switching platforms for direct shares in 2011," Peker said.


"With planners increasingly open to moving, platforms and brokers alike have the opportunity to compete for a growing slice of planners' businesses through their direct shares offering."

The survey also found planners were increasingly allocating to direct share investments and were recommending them to a wider range of clients, particularly those with SMSFs and more than \$100,000 in investible assets.

Peker noted planner confidence in direct shares was growing, but that client demand remained the most common catalyst to further advice on this asset class (cited by 37 per cent, but down from 52 per cent).



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