

News

SMA TAKE-UP SLOW

By [Milana Pokrajac](#) on 19 July 2011 [0 comments](#)

1 retweet

Separately managed accounts (SMAs) play a greater role with planners who recommend them, but the adoption rate appears very slow, according to the new report by [Investment Trends](#).



The 2011 *Separately Managed Accounts Report*, which was based on a survey of 900 planners, found SMA adoption had increased by only one percentage point to 18 per cent over the past year.

Although many have expressed interest in recommending SMAs, the conversion rate from intention to doing so was just one in 16 over the last year.

Investment Trends analyst Recep Peker (pictured) said while this may sound low, it was a relatively good result considering the tough investment environment.

"The comparable rate for exchange-traded funds – a product clients typically find easier to understand – was just one in nine," Peker said.

"Investor fear lingers near post-global financial crisis highs, markets are volatile and both planners and dealer groups are trying to work out their strategy around upcoming regulatory reforms – these factors all contribute to making the adoption of new products quite difficult," he said.

Despite this, Peker noted around 20 per cent of planners said they may start recommending SMAs to their clients over the next 12 months, estimating that they would have 16 per cent in their funds under management in SMAs by 2014.



Add a comment

| [More](#)

Tagged with:
[Investment Trends](#), [Recep Peker](#), [research and ratings](#), [separately managed accounts](#), [sma](#), [SMAs](#)

If you enjoyed this article, why not [leave a comment](#), [send it to a friend](#) or [subscribe to our free newsletter](#) to have future articles delivered to your inbox.

COMMENTS ADD A COMMENT

No comments found, be the first to add one.

Name * : Required

Email address * : Required, but never displayed.

to get Money Management delivered to your inbox

Enter your email address .



Submit your content to Money Management

Click here

Money Management Digital edition

21st Annual
Credit Law
Conference

future2

**BT Future2
Wheel Classic**

Bourke to Sydney
7-16 September

RECENT COMMENTS

"I'm going to go back to the begining of this blog and quote "BB". - if you are not seeing or communicating with these clients at least once..."
 Amanda Rin on [Clients will evaporate after FOFA, say planners](#)

"This will be my last blog on this particular storey. I know some of you will be disappointed:) The thing that has struck me as odd (in the..."
 Neil on [Clients will evaporate after FOFA, say planners](#)

"@Neil@Gez: Actually the government has a habit of stepping in when self regulation doesn't work. The examples I gave you are industries..."
 Marcus on [Clients will evaporate after FOFA, say planners](#)

"Industry super funds planner wages are generally based on getting Funds under management and retention of funds, within the fund. A..."
 Yogi on [FPA backs planners, but questions ISN](#)

Website :
 Optional, and linked if provided.

Comment * :
 Required and you can write upto 600 words for your comment.

Security code * :
 61fecb Required

Check this box to receive the latest updates in our email newsletter.

"I cant believe the comments are still going..The proposed changes are not retrospective. If you have a book of those AMP, or NM policies..."
 davidm on [Clients will evaporate after FOFA, say planners](#)

"@Fat Albert: Mate, you can read minds. You could make a fortune. How did you know I was lying? But of course you don't know that. I'm not..."
 Neil on [Clients will evaporate after FOFA, say planners](#)

"@BB I'm for eliminating conflict of interest within the industry. Read my earlier post. That organisation needs a kick in the..."
 Cookie Monster on [Clients will evaporate after FOFA, say planners](#)

"Wow, hell truly is other planners (who think they have the moral highground do you!). I don't think anything can be achieved at this point..."
 Matt on [Clients will evaporate after FOFA, say planners](#)

Categories

- [Accountancy](#)
- [Actuarial](#)
- [Asset Consultants](#)
- [Consulting](#)
- [Custodian and Trustee Services](#)
- [Editorial](#)
- [Education and Training](#)
- [Financial planning](#)
- [Funds Management](#)
- [Government and Regulation](#)
- [Industry Associations](#)
- [Legal](#)
- [Marketing and Public Relations](#)
- [Media and Information Services](#)
- [Mortgage Broking](#)
- [Recruitment](#)
- [Regulation](#)
- [Research and Ratings](#)
- [Risk/insurance](#)
- [Software and IT](#)
- [Stockbroking](#)
- [Superannuation](#)
- [Taxation](#)

Browse topics

A	B	C	D	E	F	G	H	I
J	K	L	M	N	O	P	Q	R
S	T	U	V	W	X	Y	Z	#

Recently added topics

- [excess contributions tax](#) [contribution reserve](#)
- [contribution splitting](#) [SMSF strategies](#) [top five](#)
- [The SMSF Academy](#) [deficit](#) [eurodebt](#)
- [Richard Hoey](#) [Institute of Chartered Accounts](#)

About

The Money Management website is an essential online source of financial services information and a community resource where finance professionals interact.

- [Contact Us](#)
- [Advertise with us](#)
- [Subscribe](#)
- [Media kit](#)
- [Terms of Use](#)
- [Privacy Policy](#)

Related sites

- [Cordell Tenders](#)
- [Financial Planning](#)
- [HotFrog](#)
- [Super Review](#)
- [View all our sites](#)