April 2022 Survey

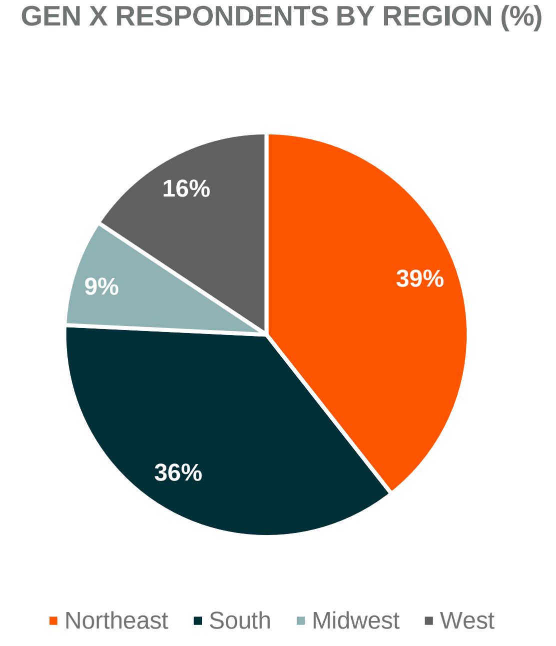
Beyond Baby Boomers

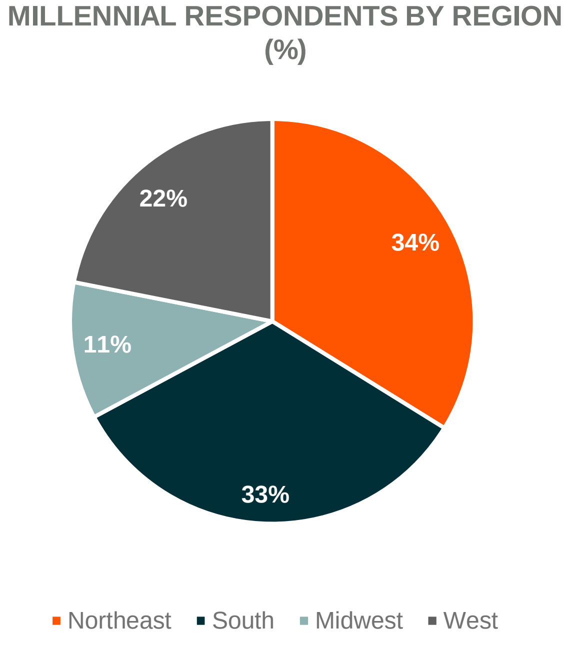
Q2 2022

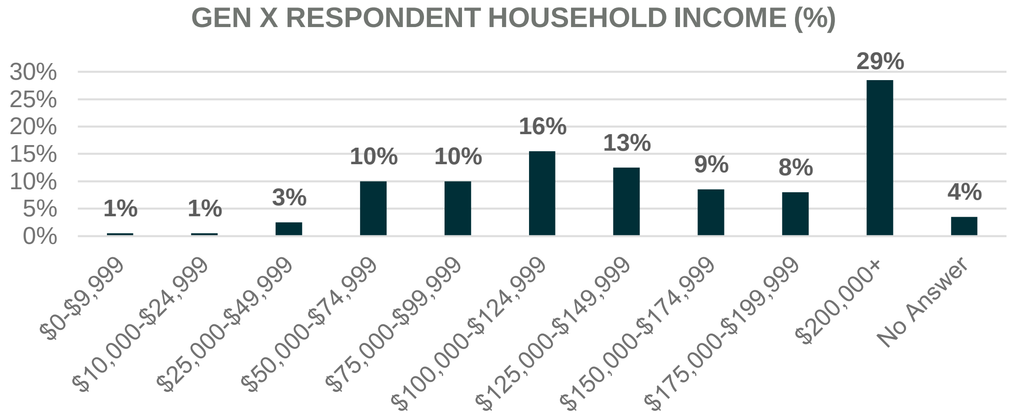
FOR USE WITH INSTITUTIONS ONLY – NOT FOR USE WITH RETAIL INVESTORS

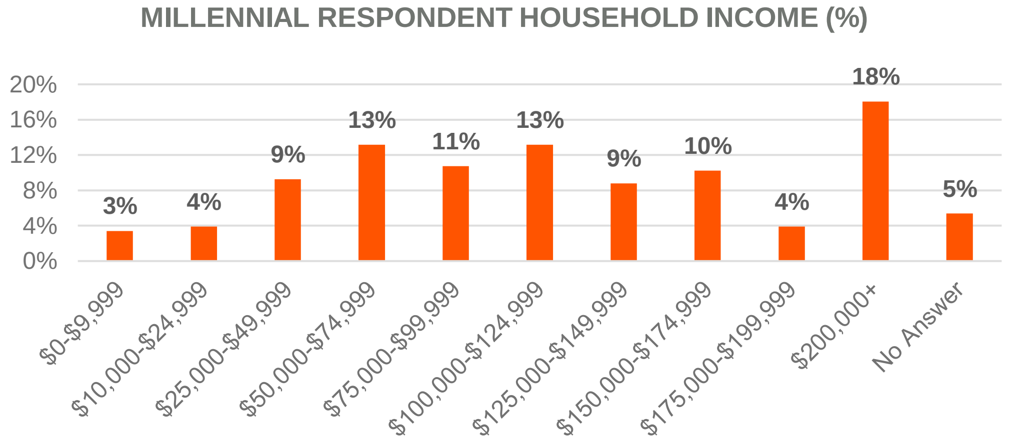
Survey: Millennial & Gen X Region, Lifestyle Demographics

In April 2022, Global X Research surveyed 621 individuals in the United States on their investing viewpoints attuned to generational differences. Of these 621 individuals, 205 were Millennials (*ages 26-41*) and 200 were Gen X (*ages 42-57*) while the rest were General Population.*









Source: Global X, April 2022.

** General Population refers to a third random sampling across all generational groups between ages 21-86.*

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All numbers are approximate

The Value Of Human Advice In Investing Remains Higher Than Ever

YOUNG GENERATIONS ARE LOOKING TO INCREASE ASSETS MANAGED BY AN ADVISOR

Q: OVER THE NEXT 10 YEARS, DO YOU BELIEVE THE PERCENTAGE OF YOUR INVESTABLE ASSETS MANAGED BY A FINANCIAL ADVISOR OR BROKER WILL INCREASE?
(% LOOKING TO INCREASE)

Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.

87% MILLENNIALS *(ages 26-41)*

80% GEN X *(ages 42-57)*

GLOBAL X by Mirae Asset

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COMMENTARY

While robo-advisors do present a new kind of option for Millennials and Gen X'ers, our survey found that these younger generations are far from finished considering increasing assets managed by a human…

If you are a financial advisor, a question to ask yourself might be "How can I capture more of these assets?"

Our survey illuminates one potential answer to this question, and it isn't a dark secret. Simply put: "Connect with them how they want and when they want."

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Financial Advisors Should Become More Tech Savvy

THERE IS A STRONG IMPACT OF TECH CAPABILITIES ON WORKING WITH FINANCIAL ADVISORS

Q: HOW MUCH OF AN EFFECT, IF ANY, WOULD A FINANCIAL ADVISOR HAVING STRONG TECHNOLOGICAL CAPABILITIES HAVE ON YOUR LIKELIHOOD TO WORK WITH THEM? (% MUCH/SOMEWHAT MORE LIKELY)

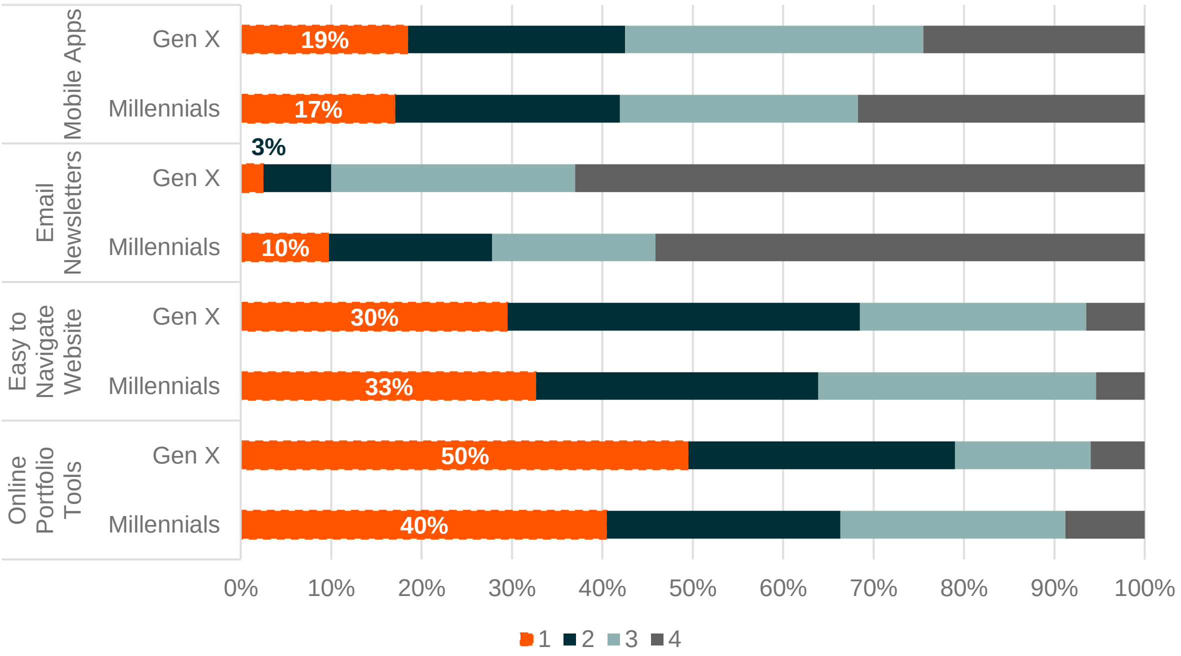
92% MILLENNIALS *(ages 26-41)*

79% GEN X *(ages 42-57)*

Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.

SOME FINANCIAL ADVISOR TECH CAPABILITIES ARE MORE IMPORTANT THAN OTHERS

Q: WHAT ARE THE MOST IMPORTANT TECHNOLOGICAL CAPABILITIES FOR A FINANCIAL ADVISOR TO HAVE? RANK THE FOLLOWING BY MOST IMPORTANT TO LEAST IMPORTANT. (% OF RESPONDENTS)



Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.

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Financial Advisors Should Increase Their Knowledge of Thematic Investing

MILLENNIALS COME OUT ON TOP AS THE DEMOGRAPHIC MOST INTERESTED IN THEMATIC INVESTING

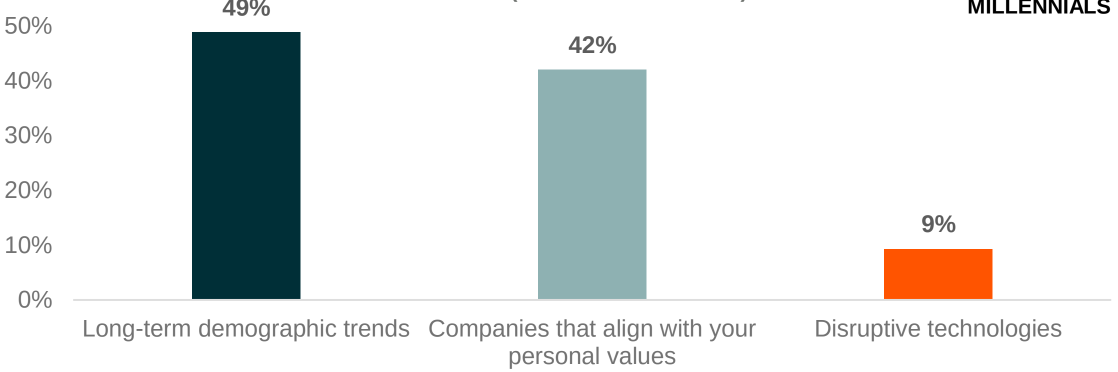
Q: HOW INTERESTED ARE YOU IN THEMATIC INVESTING?
(% EXTREMELY/VERY INTERESTED)

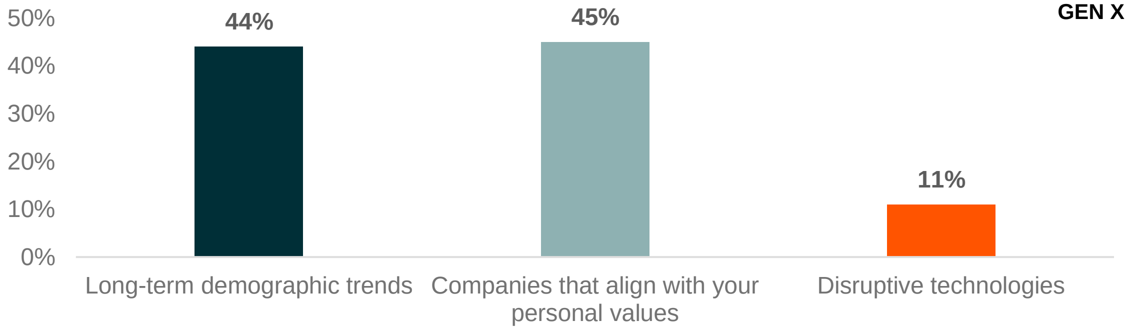
50%	MILLENNIALS	*(ages 26-41)*
22%	GEN X	*(ages 42-57)*
24%	GENERAL POPULATION	

Note: N = 205 (Millennials), N = 200 (Gen X), N = 216 (Gen Pop)
Source: Global X, April 2022.

THERE IS SIZABLE INVESTOR INTEREST WITHIN KEY THEMATIC INVESTING TRENDS

Q: WHICH OF THE FOLLOWING CATEGORIES OF THEMATIC INVESTING INTERESTS YOU MOST?
(% OF RESPONDENTS)



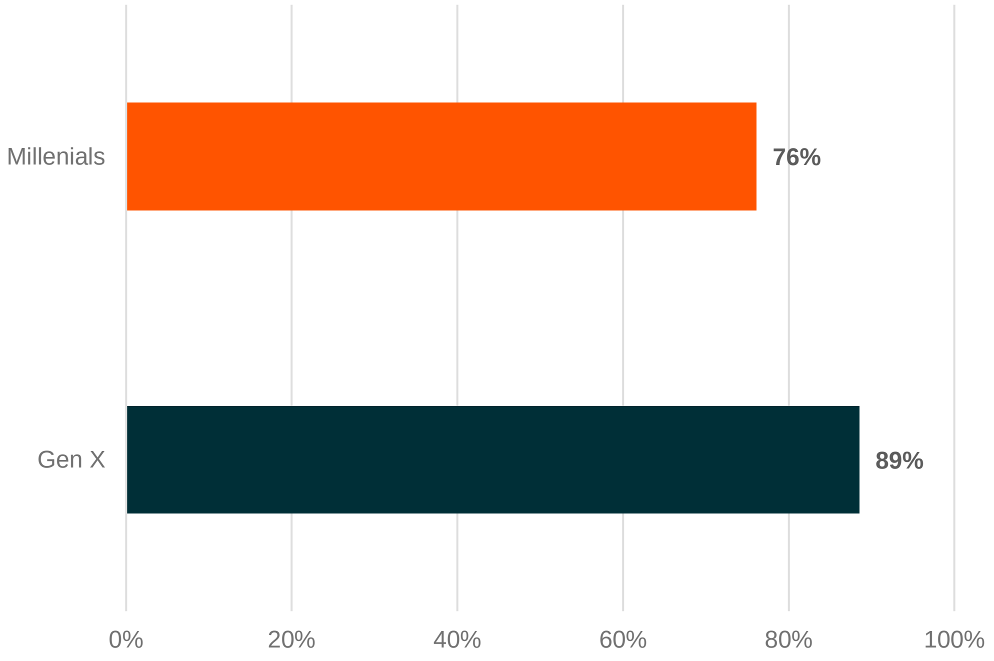


Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.
All available responses shown.

Gen X'ers And Millennials Both Prefer Frequent Communication and Many Are Open To Do So Through Social Media

THERE IS A MAJORITY PREFERENCE TO INTERACT WITH AN ADVISOR AT LEAST QUARTERLY

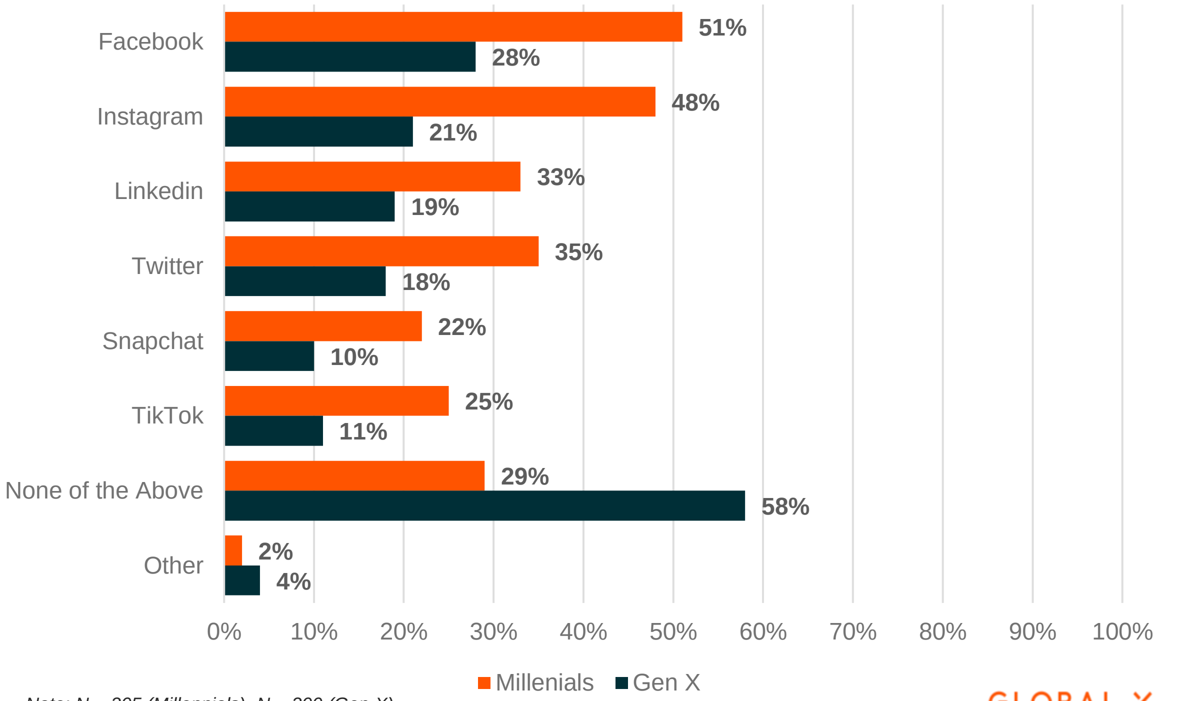
Q: HOW OFTEN WOULD YOU LIKE TO RECEIVE INFORMATION FROM YOUR FINANCIAL ADVISOR?
(% QUARTERLY OR MORE)



Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.

MILLENNIALS CHOOSE FACEBOOK AND INSTAGRAM AS THE DESIGNATED PLATFORMS TO CONNECT WITH ADVISORS

Q: ON WHAT SOCIAL MEDIA PLATFORMS ARE YOU CONNECTED WITH YOUR FINANCIAL ADVISOR? CHECK ALL THAT APPLY.
(% OF RESPONDENTS)



Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.

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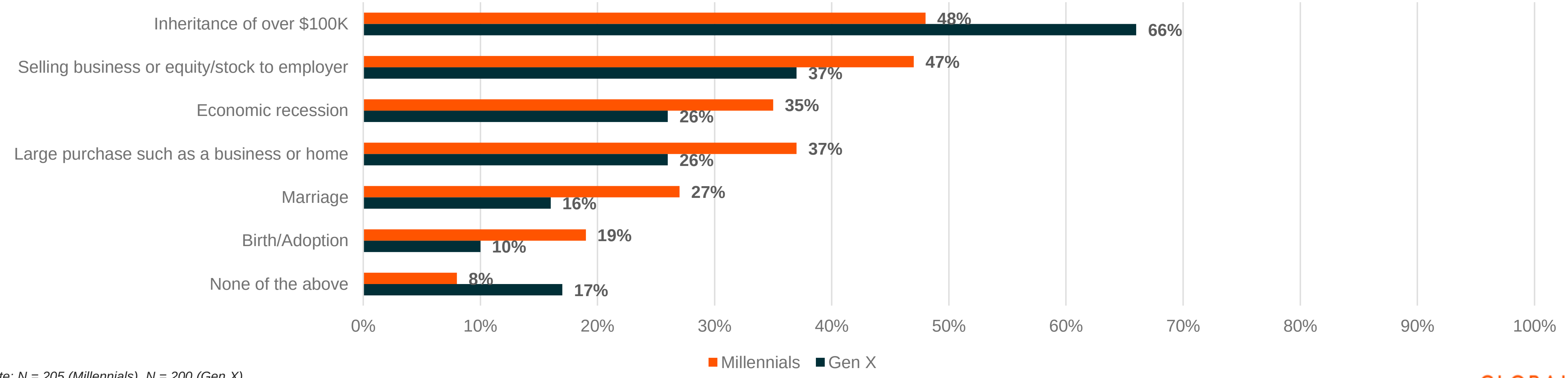
Social Media Allows Financial Advisors To Be In The Know About Life Events

PROMINENT LIFE EVENTS MAY RESULT IN INVESTORS INCREASING AMOUNT OF INVESTABLE ASSETS ON MANY OCCASIONS

Q: HOW LIKELY WOULD YOU BE TO SIGNIFICANTLY INCREASE THE PERCENTAGE OF YOUR INVESTABLE ASSETS MANAGED BY A FINANCIAL ADVISOR DURING THE FOLLOWING LIFE EVENTS? CHECK ALL THAT APPLY.
(% OF RESPONDENTS)



Note: N = 205 (Millennials), N = 200 (Gen X)
Source: Global X, April 2022.

COMMENTARY

When an advisor connects with his/her clients via social media, some life events, such as marriage or births/adoptions, may come through those social media feeds.

Some of these life events may cause alterations to an individual's investment style, size, and needs.

Global X ETF Suite

Global X 's fund suites comprise of 93 ETFs in total, spanning Thematic Growth, Income, International Access, Commodities, and Other Strategies.[1]

Disruptive Technology

Social Media ETF (SOCL)

Lithium & Battery Tech ETF (LIT)

FinTech ETF (FINX)

Internet of Things ETF (SNSR)

Robotics & Artificial Intelligence ETF (BOTZ)

Autonomous & Electric Vehicles ETF (DRIV)

Artificial Intelligence & Technology (AIQ)

Cloud Computing ETF (CLOU)

Video Games & Esports ETF (HERO)

Cybersecurity ETF (BUG)

Data Center REITs & Digital Infrastructure ETF (VPN)

Blockchain & Bitcoin Strategy ETF (BITS)

Blockchain ETF (BKCH)

People & Demographics

Millennial Consumer ETF (MILN)

Aging Population ETF (AGNG)

Health & Wellness ETF (BFIT)

E-commerce ETF (EBIZ)

Cannabis ETF (POTX)

Education ETF (EDUT)

Telemedicine & Digital Health (EDOC)

Genomics & Biotechnology ETF (GNOM)

China Biotech Innovation ETF (CHB)

Emerging Markets Internet & E-commerce ETF (EWEB)

Physical Environment

U.S. Infrastructure Development ETF (PAVE)

Renewable Energy Producers ETF (RNRG)

CleanTech ETF (CTEC)

Clean Water ETF (AQWA)

Wind Energy ETF (WNDY)

Solar ETF (RAYS)

Hydrogen ETF (HYDR)

AgTech & Food Innovation ETF (KROP)

Disruptive Materials ETF (DMAT)

Green Building ETF (GRNR)

Multi-Theme

Thematic Growth ETF (GXTG)

China Innovation ETF (KEJI)

Dividend

SuperDividend ETF (SDIV)

SuperDividend U.S. ETF (DIV)

MSCI SuperDividend EAFE ETF (EFAS)

MSCI SuperDividend Emerging Markets ETF (SDEM)

SuperDividend REIT ETF (SRET)

Alternative Income ETF (ALTY)

S&P 500 Quality Dividend ETF (QDIV)

Covered Call

Dow 30 Covered Call ETF (DJIA)

Nasdaq 100 Covered Call ETF (QYLD)

S&P 500 Covered Call ETF (XYLD)

Russell 2000 Covered Call ETF (RYLD)

Nasdaq 100 Covered Call & Growth ETF (QYLG)

S&P 500 Covered Call & Growth ETF (XYLG)

[1]As of April, 2022

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Preferreds

U.S. Preferred ETF (PFFD)

Variable Rate Preferred ETF (PFFV)

SuperIncome Preferred ETF (SPFF)

MLPs

MLP ETF (MLPA)

MLP & Energy Infrastructure ETF (MLPX)

Fixed Income

Emerging Markets Bond ETF (EMBD)

Risk Managed Income

Nasdaq 100 Risk Managed Income ETF (QRMI)

S&P 500 Risk Managed Income ETF (XRMI)

China Sector

MSCI China Energy ETF (CHIE)

MSCI China Materials ETF (CHIM)

MSCI China Industrials ETF (CHII)

MSCI China Consumer Discretionary ETF (CHIQ)

MSCI China Consumer Staples ETF (CHIS)

MSCI China Health Care ETF (CHIH)

MSCI China Financials ETF (CHIX)

MSCI China Information Technology ETF (CHIK)

MSCI China Communication Services ETF (CHIC)

MSCI China Utilities ETF (CHIU)

MSCI China Real Estate ETF (CHIR)

Single-Country

MSCI Argentina ETF (ARGT)

DAX Germany ETF (DAX)

MSCI Greece ETF (GREK)

MSCI Colombia ETF (GXG)

MSCI Nigeria ETF (NGE)

MSCI Norway ETF (NORW)

MSCI Pakistan ETF (PAK)

MSCI Portugal ETF (PGAL)

MSCI Vietnam ETF (VNAM)

Regional

MSCI Next Emerging & Frontier ETF (EMFM)

FTSE Southeast Asia ETF (ASEA)

Commodities

Silver Miners ETF (SIL)

Gold Explorers ETF (GOEX)

Copper Miners ETF (COPX)

Uranium ETF (URA)

Adaptive

Adaptive U.S. Factor ETF (AUSF)

Sustainable Investing

Conscious Companies ETF (KRMA)

Faith-Based

S&P 500 Catholic Values ETF (CATH)

S&P 500 Catholic Values Developed ex-U.S. ETF (CEFA)

Risk Management

Adaptive U.S. Risk Management ETF (ONOF)

Nasdaq 100 Collar 95-110 ETF (QCLR)

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Nasdaq 100 Tail Risk ETF QTR)

S&P 500 Collar 95-110 ETF (XCLR)

S&P 500 Tail Risk ETF (XTR)

Alpha

Guru Index ETF (GURU)

Founder-Run Companies ETF (BOSS)

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