FEB 23

KURTOSYS

25 best investment management websites

This 2023 edition builds on our previous 2021 guide, featuring a selection of the best-designed websites from the leading investment management firms.



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A new look at the world of investment management websites.



Welcome to our latest white paper on investment management website design. In this 2023 edition, we present a carefully curated selection of the 25 best investment management websites, highlighting innovative and noteworthy developments in digital client experience.

As the world continues to grapple with the effects of the pandemic and economic slowdown, investment managers face increased competition to stand out in the market.

To meet this challenge, it is crucial to evaluate the client experience and identify how website design can enhance or detract from it. While this white paper is not an exhaustive list or a formal quantitative research study, it is intended to inspire and provide a rich foundation for further discussion and discourse. Our goal is to share valuable insights on how to improve digital client experience and stay competitive in today's market.

At Kurtosys, we understand the importance of staying on top of the latest trends in website design and user experience. As a Senior Product Manager and now Head of Client Service, I have learnt what a major role accessibility and performance play in recent years. With the complexity and vast amount of data investment managers work with, these needs must be carefully weighed and considered to deliver real insights with simplicity that investors appreciate.

NATALIE KENNEDY,
HEAD OF CLIENT SERVICE

Join us as we explore the best in investment management website design and discover how to enhance your digital client experience.

Introducing our panel

Our panel of website and product experts have spent the past few months exploring the internet and looking for the best examples of investment manager websites and digital platforms.



NEIL THORNBURN
CHIEF EXPERIENCE OFFICER

Neil is a creative senior leader with extensive marketing and digital experience across multiple global sectors, specializing in financial services and investment management.

Focusing on financial services, Neil has supported many organizations with their digital strategy including Lombard Odier and serving as Head of Digital EMEA at JP Morgan for five years.



NATALIE KENNEDY
HEAD OF CLIENT SERVICE

When Natalie joined Kurtosys in 2017, she took on Web & Document implementation projects for some of Kurtosys' largest clients. Natalie then moved into the product department to head up the product managers where she enjoyed being part of the wide range of SaaS solutions that are being developed.

She is now the Head of Client Service.



ADRI LOUBSER
DIGITAL PROJECT MANAGER

Adri is a digital project manager whose roles have found her leading international projects from digital marketing agencies in South Africa, client service operations in Stockholm, full-tier app launches in India to digital strategy tools and work-flow processes in the UK.



ANNELIESE THOMAS
HEAD OF MARKETING

In her role as Head of Marketing, Anneliese's deep experience in digital and financial services is vital to continuously evolving customer experiences to serve investor needs. Having worked in a range of agencies, Anneliese is an experienced marketer with a passion for fintech.

A clear focus on data, accessibility and performance



In the digital world, data is king, but we all suffer from information overload. That's why it's becoming ever-more crucial for investors to find the fund information they need with minimal clicks and less hunting around in sub menus.

We also know that many end users view these sites on multiple devices, whether it's working on detailed fund information on a desktop machine, or quickly checking one fund stat on a smartphone.

As accessibility and ease of use have become key metrics when measuring any website, we've added some useful stats on site accessibility and performance to this 2023 edition.[1]

To help you see each site's overall performance at a glance, we've created key indicator badges.

We're also shining a spotlight on some honorable mentions for creative and well-thought-out sites and our own picks of the best site design and accessibility.

So, let's dive in and see how website design and functionality have evolved in recent years.

1. Accessibility and Performance scores are based on measurements made using Google's Lighthouse Audits tool.

How we selected and measured each website

Our selection process for the 25 best investment management websites featured in this white paper was subjective and not exhaustive. We reviewed a substantial number of sites, at least 150, and rather than focusing solely on obvious choices, we aimed to uncover some of the more unusual and interesting finds.

In addition to examining the top 100 asset managers by managed AUM, we revisited firms previously reviewed to assess how their websites have evolved and whether they remain relevant to their clients, as well as including sites that caught our eye.

We believe our selection will offer valuable insights and inspiration for investment managers seeking to enhance their digital client experience.

To keep our review process consistent, we've stuck to seven key metrics, plus an accessibility score[1] (using the Google Lighthouse tool) and a performance score (using PageSpeed Insights). These serve as the foundations for our measurements, to allow for an accurate and independent overview of every site that's been included in the report.

Cookies and T&Cs: Does the site ask you to accept their cookies? And does the firm have a privacy policy in place? There are bonus points to be had if the T&Cs are relevant to the type of user you are.

Country specific site: Are you asked to select your country and are you served different content? Do the funds change depending on your selection? Are the cookies GDPR, DPA or CCPA compliant?

Role definition leads to tailored content: If you're asked for your role, does the site provide you with content and information that's relevant to that role? For example, do retail users get different content from institutional users?

Relevant information on the homepage: It's not good practice to try and squeeze every bit of information onto a homepage. But it should be clear where the information is and getting there should take no more than two clicks – as a general rule of thumb.

Speedy to load: Is your website lightning fast? A speedy website not only enhances the user experience, but also keeps visitors engaged and coming back for more. Please note that this metric is based on the perceived load time by the user at the time of testing.

Fund factsheets (FS) can be easily found: Most investment managers come to a site to find the FS. So, can you find it easily? Can you search for the FS using their abbreviated titles, and is the process of viewing and downloading the information straightforward?

Good site design: Does the site look good and give you the right impression of the firm's brand? And has the website designer got the right balance between new and exciting design and a user interface (UI) that delivers a seamless experience?

It is also worth noting that responsiveness to the device used by the end user is a minimum requirement and all sites reviewed have fulfilled this requirement.

1. Accessibility and Performance scores are based on measurements made using Google's Lighthouse Audits tool.

Our Performance Dashboard



Each site review includes our quick-look performance dashboard, giving you a breakdown of the score for our seven key metrics. These seven metrics are subjective measurements from our panel, but have been carefully calculated to give you the best overall summary of a site's performance, design and usability. We've also included scores for both site accessibility and site performance[1], to give a better understanding of each site's capabilities.

Accessibility audits:
It's important that every end user, whatever their capabilities or disabilities, can access a website. We've used Google's Lighthouse tool to measure the accessibility of each site in the report. Lighthouse can only automatically detect a subset of accessibility issues, so we've also added our own subjective comments regarding each site's accessibility.

Performance audits:
The performance of a site is paramount, so we've used Google's PageSpeed Insights (PSI) to provide a performance score for each site in the report.

Google's PageSpeed Insights (PSI) tool is a tool that reports on the performance of a page, both on desktop and mobile devices. It analyzes the content of a web page, then generates suggestions to make that page faster. The tool measures the time to fully load a page and assigns a score based on that time, giving suggestions on how to improve the page load time.

It examines factors such as image compression, file size, and the use of browser caching, as well as the use of best practices such as minifying code, to help identify opportunities to improve the page's performance. However, it's worth noting that PSI only provides an indicator of a page's performance and other factors such as network speed, server performance, and browser capabilities can also affect the loading speed of a website. Additionally, the tool is only analyzing the technical aspects of the website, and it does not take into account the user experience, design, or other factors that can impact the overall performance of the website.

We believe the performance dashboard is the simplest way to get an overview of site performance and how each site measures up against the industry standard.

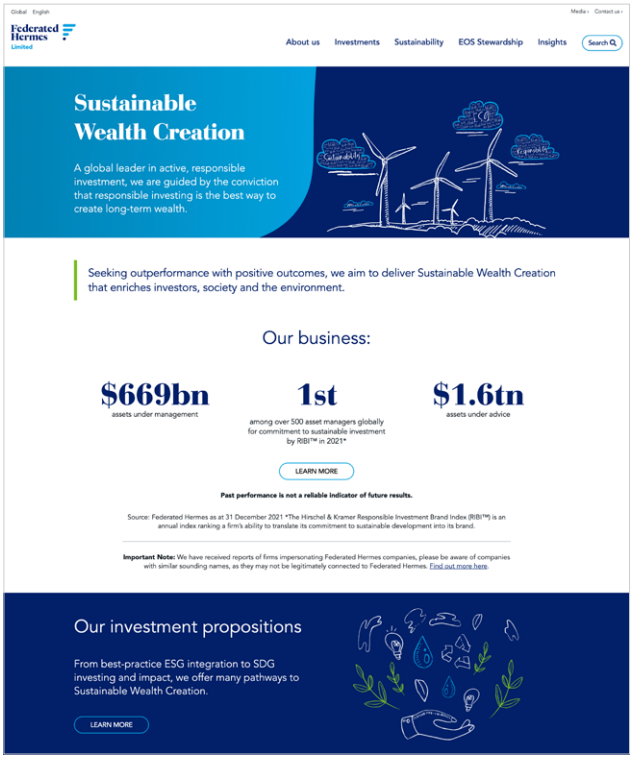
1. Accessibility and Performance scores are based on measurements made using Google's Lighthouse Audits tool.

Our top picks

Our top picks for investment management website design are the firms that have succeeded in creating modern and functional websites that stand out in the industry. As expected, many of these sites come from big players in the industry.

However, we've also included some smaller firms that are leading the way in website design and functionality. A key consideration in our selection process was finding sites that achieved a balance between a visually appealing design and an easy-to-navigate user experience.

These websites are great examples of how investment management firms can effectively showcase their products and services while providing a seamless user experience.



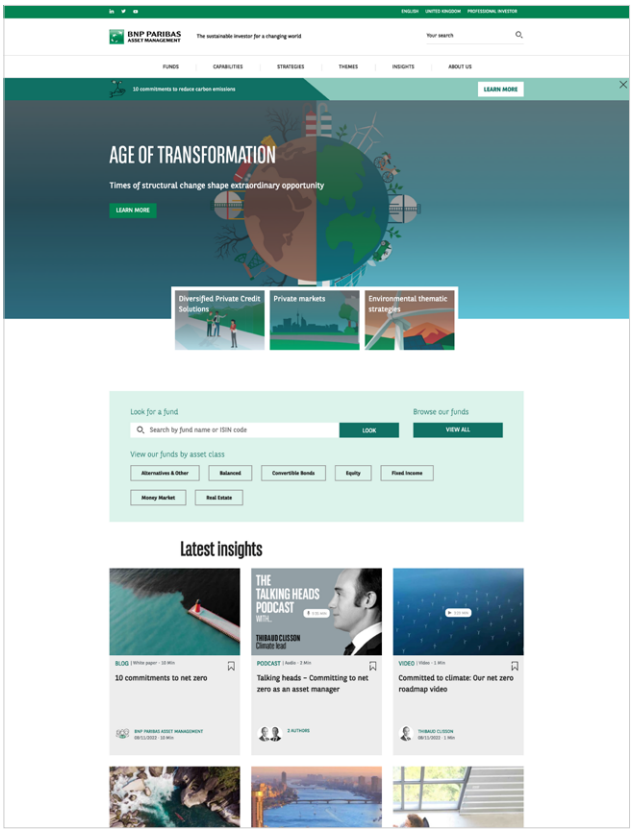
Federated Hermes

Federated Hermes' site is instantly recognizable when viewed against the competition. We love the use of on-brand illustrations and the big, readable font that boosts accessibility.

Keeping the site copy to the minimum, by sticking to the point, helps to create a clean and simple site that's very easy to navigate.

Overall, Federated Hermes' website offers a visually appealing and easy-to-navigate experience that stands out from the competition.

Google performance score 88 Lighthouse accessibility score 87



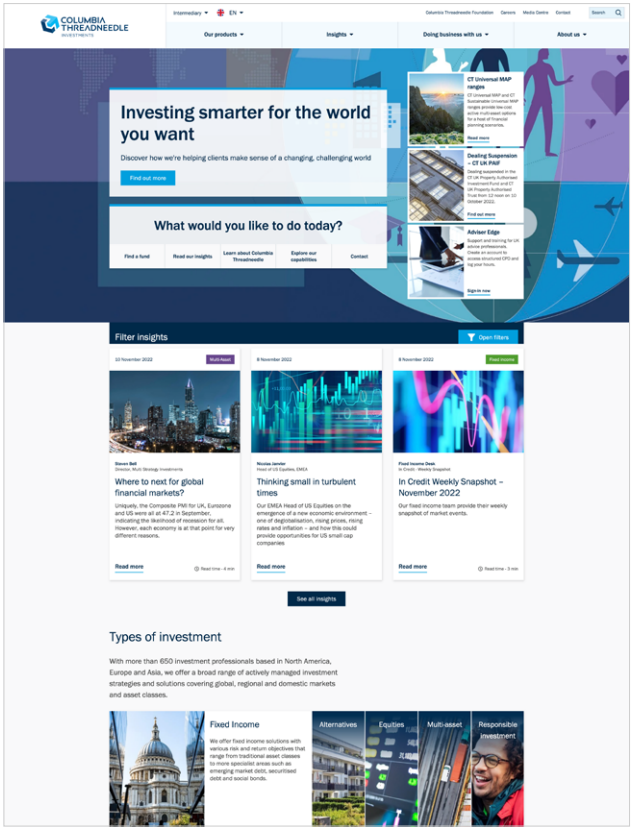
BNP Paribas

The BNP Paribas' site is a great example of a well thought out user journey tailored to your specific country and investor role.

All the information you need is there up front and we particularly liked the handy 'Look for a fund' pane that makes it simple to find the right FS.

The site's use of stylised illustrations throughout the website add a touch of elegance to the overall user experience. These illustrations give the site a modern feel while also harking back to a more retro art-deco style.

Google performance score 59 Lighthouse accessibility score 83

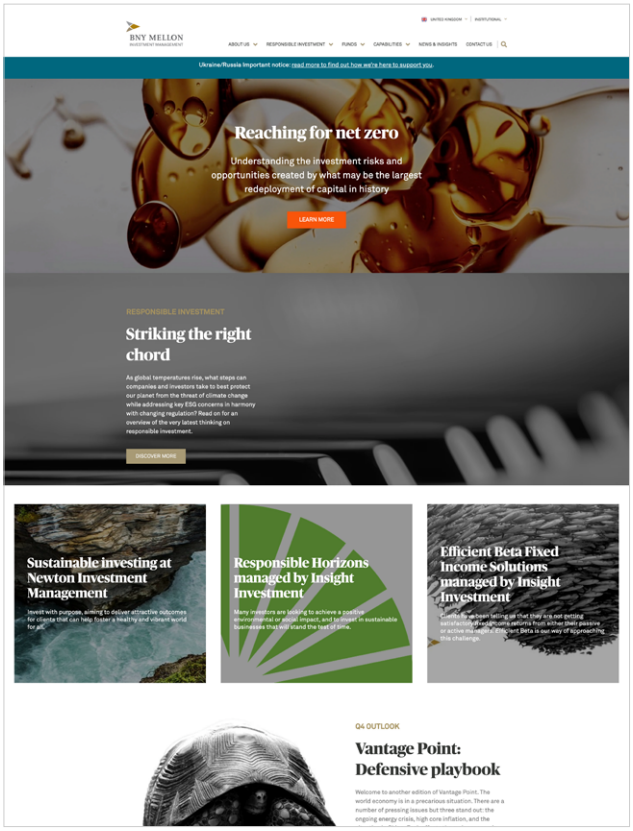


Columbia Threadneedle

Columbia Threadneedle makes a strong first impression and takes care to help you personalize your journey through a detailed attestation process.

We especially liked the 'What would you like to do today?' section, that offers you the most commonly needed functionality all in one central pane above the fold, making it easy for the user to find and access popular information without having to search too hard.

Google performance score 70 Lighthouse accessibility score 89

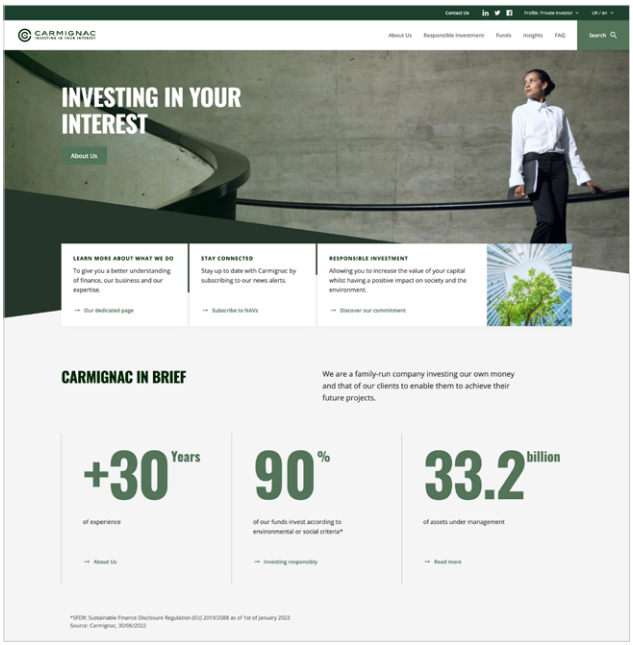


BNY Mellon

BNY Mellon's site excels in providing a personalized user experience, with carefully crafted questions and tailored journeys for different countries and regions. The minimalist and user-friendly interface allows for easy navigation and quick access to key areas of the site, even though the homepage may not cover everything.

The design of the website is elegantly simple, making excellent use of white space, while also incorporating visually engaging animations and graphics that add to the overall aesthetic without being distracting. The design strikes a great balance between functionality and aesthetics.

Google performance score 77 Lighthouse accessibility score 90



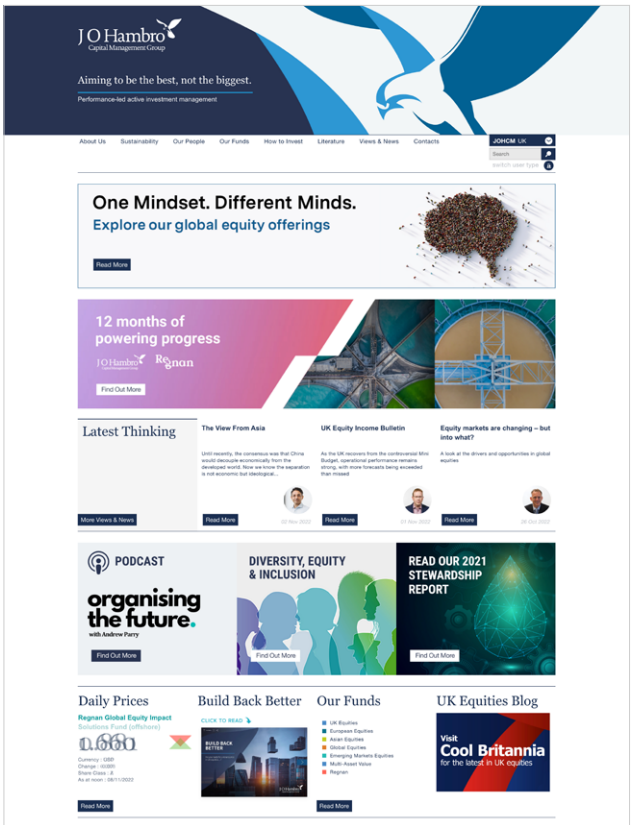
Carmignac

Carmignac's site has many strong features, including the thoughtful approach of asking the user's role before directing them to the homepage, which helps to personalize their journey.

To add to this, while the website navigation is efficient, reducing the number of clicks required to find the desired fund factsheet information could further enhance the user experience.

The design is professional and tidy. Incorporating some more adventurous choices in the use of images and layout could add an extra layer of engagement and brand differentiation for the users.

Google performance score 96 Lighthouse accessibility score 100



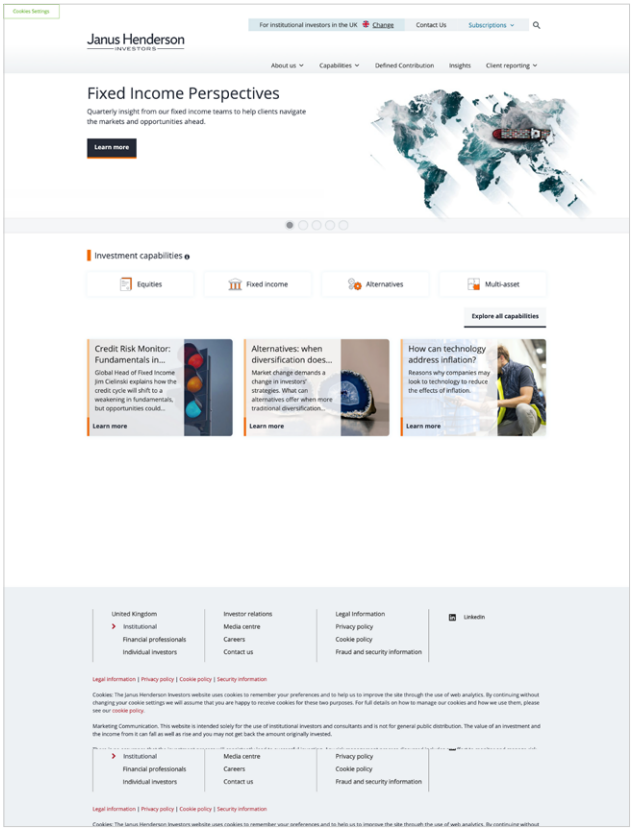
J O Hambro

J O Hambro's site is effective and scored well for delivering a personalized user journey that loads quickly. Some enhancements to layout to reduce the amount of real estate on the pages and incorporating more white space could further enhance the overall design.

The 'Our funds' section is a helpful addition that could be more prominently displayed by prioritizing it a little higher, which would make it more accessible for the users faster.

We'd like to give J O Hambro a shout-out for its fast site load speed, a key feature that greatly improves the user experience and can be challenging to achieve.

Google performance score 77 Lighthouse accessibility score 83



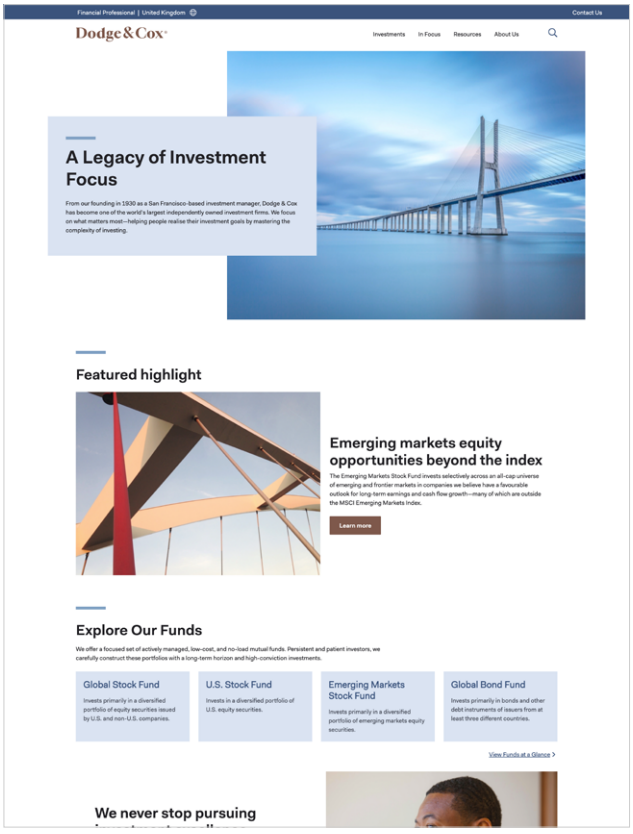
Janus Henderson

Janus Henderson's website does an excellent job of tailoring the user journey and the bold use of whitespace provides a really slick interface for the user.

Their insights section deserves a special mention. The very intuitive interface, neatly organized content modules with clear filtering by subject and media type, coupled with high-quality content makes this a valuable asset to the overall website.

With the wealth of content, there is an opportunity to reduce the number of clicks to reach a specific area (for example strategy information) which would further improve the overall UX.

Google performance score 60 Lighthouse accessibility score 88



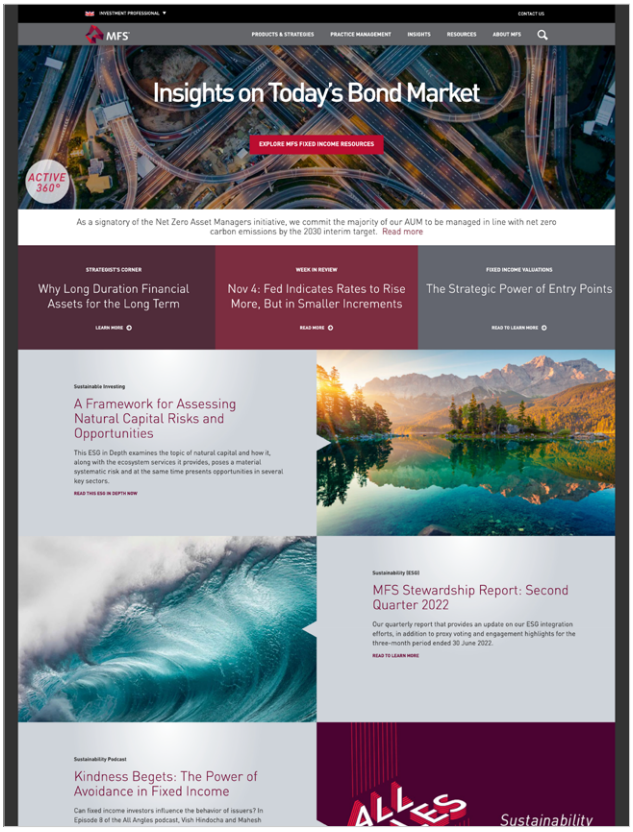
Dodge & Cox

Dodge & Cox's site is a simple and straightforward website that pays off highly in terms of speed and accessibility. The design is minimalist with plenty of white space and a top menu that makes the most of this simplicity.

The large 'Explore our funds' section is a good introduction to the fund information and links through to some helpful fund data and data visualizations.

We love this no-nonsense approach where function is prioritized over form.

Google performance score 97 Lighthouse accessibility score 100



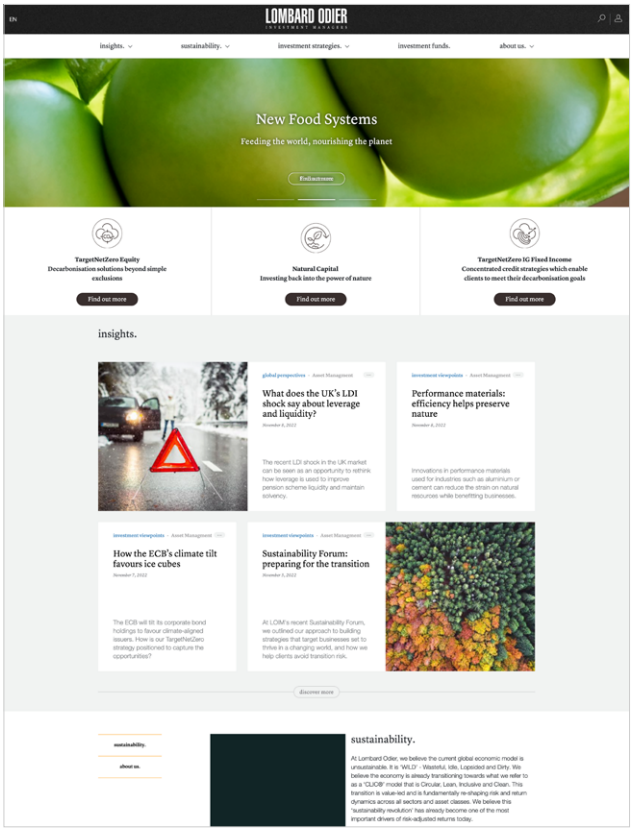
MFS

MFS's site makes a confident and lasting impression with its use of color and large, easily-read fonts on the homepage. The clear sections and handy 'Discover our products' drop-down make navigation a breeze.

Adding more key information on the homepage and focusing on a faster loading speed will further enhance the user experience.

This is a site with its own personality that's not afraid to look different and we admire the boldness of design choices.

Google performance score 16 Lighthouse accessibility score 94



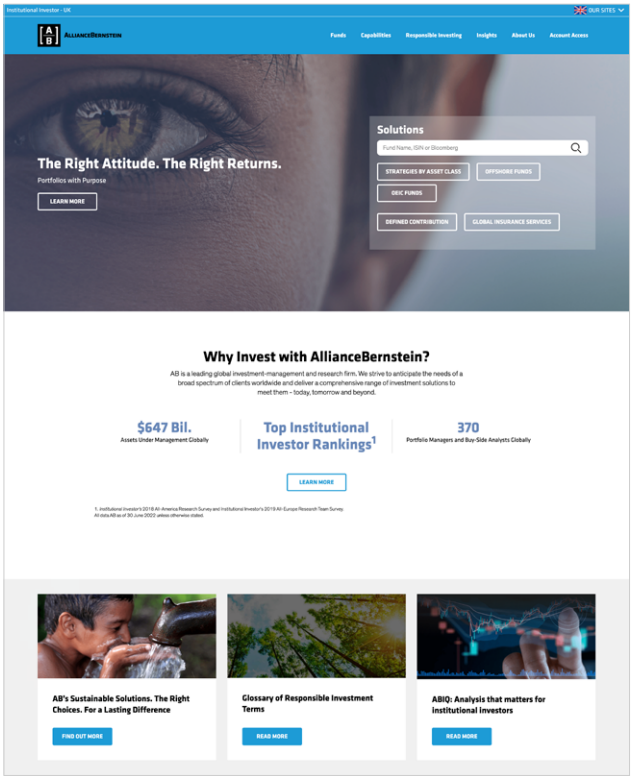
Lombard Odier

Lombard Odier's design is simple and visually appealing. The homepage features a large, full-screen animated image and an organized menu that has improved the user experience from the previous hamburger menu.

The funds section is well-designed, using color coding and various menu options to allow easy viewing by asset class, strategy, category, or currency.

While there may be occasional hiccups with losing the breadcrumb navigation, the global navigation is clearly visible (and sticky), making it a worthy entry into the list.

Google performance score 83 Lighthouse accessibility score 89

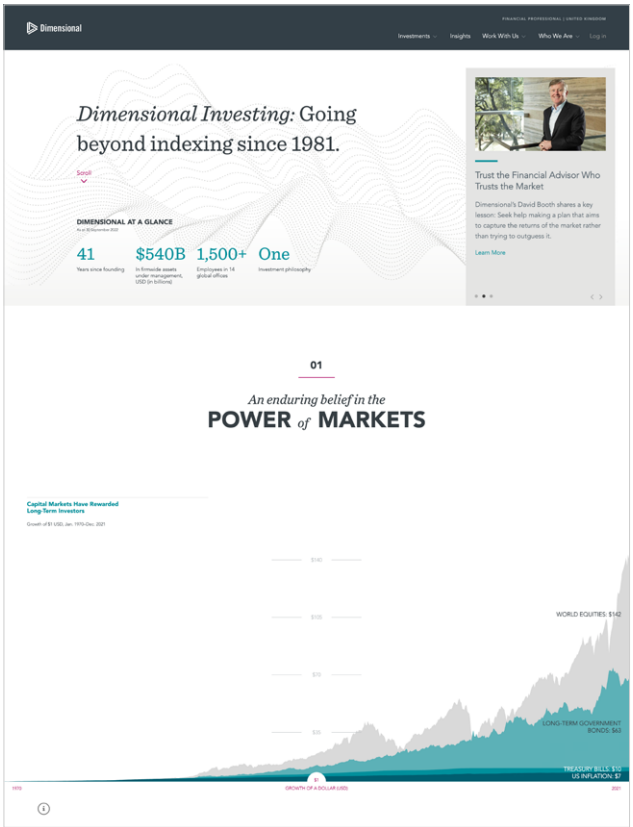


Alliance Bernstein

Alliance Bernstein's site is well-designed, with a prominent fund finder search right at the top on point of entry that allows you to search by Fund Name, ISIN or Bloomberg ticker. All the information you need is displayed upfront, making it a great experience for the user.

Individual Investors are served a different homepage from Institutional showing a thorough understanding of their market and their dedication to delivering tailored, relevant content to each audience.

Google performance score 41 Lighthouse accessibility score 73

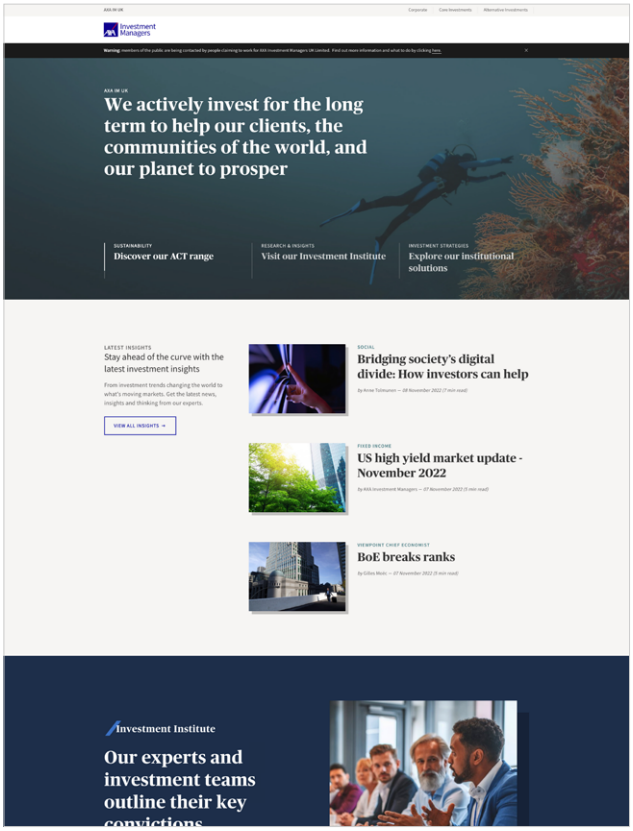


Dimensional Investing

Dimensional Investing's site has a modern design with interactive features that present themselves beautifully as you scroll.

Although the initial process takes a few clicks, it offers a good mix of data visualization, graphics, and audio clips from their top team. The website provides a good mix of interactivity with tailored information for different user types.

Google performance score 30 Lighthouse accessibility score 89

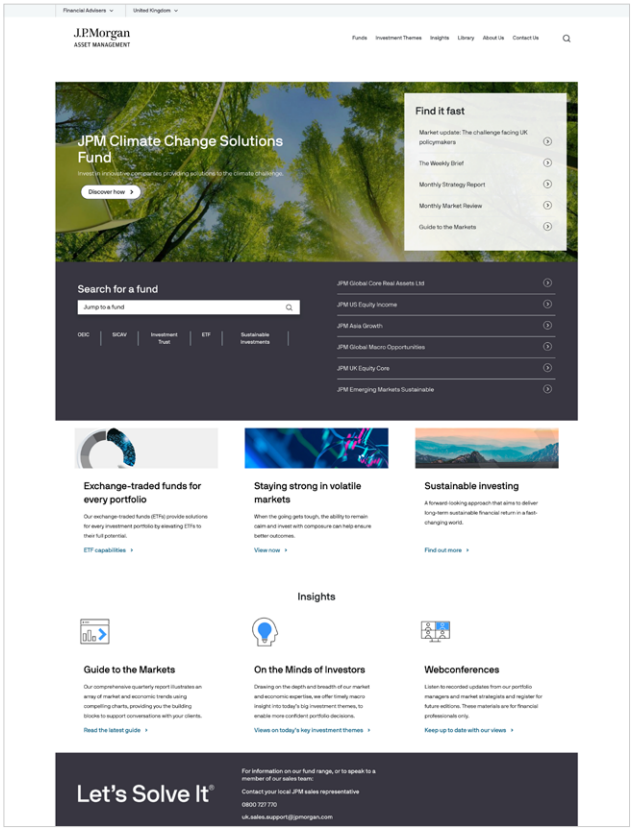


AXA Investment Managers

AXA Investment Managers' website exudes a professional and sophisticated feel with its clean and well-designed layout. The site offers a wealth of informative content, though some of it may be a bit lengthy.

We especially appreciate the thoughtful approach to the attestation, a common pain point for asset managers (where users self-certify their roles and location). The site handles this at the point of content delivery, whether more detailed / specific industry insights or at the fund information level; this separation allows for a more streamlined experience across marketing content and campaign focused information, while ticking the compliance boxes once you get down to the fund-specific information.

Google performance score 73 Lighthouse accessibility score 96



JP Morgan

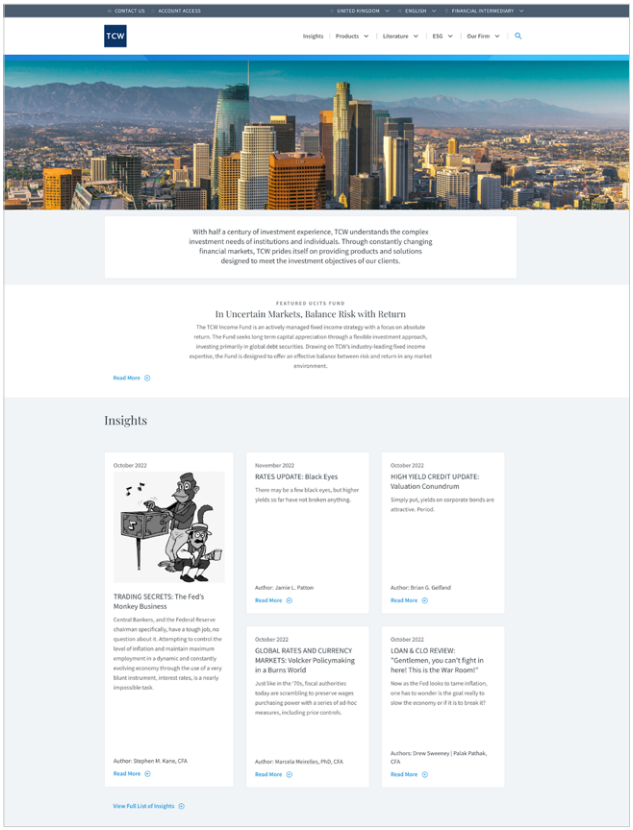
JP Morgan's site fundamentally ticks all the boxes and is an excellent example of how to build an effective investment management site.

It covers all the important aspects, with a clean and clear design that puts everything you need to know right at the top of the page, a clear focus on user experience makes key information easily accessible.

The "Find it fast" section is a brilliant way to highlight the most commonly needed areas of the site, making it easy for users to find the information they need.

The website relies mostly on copy and strategically placed icons to convey its message, rather than using a lot of images.

Google performance score 58 Lighthouse accessibility score 96

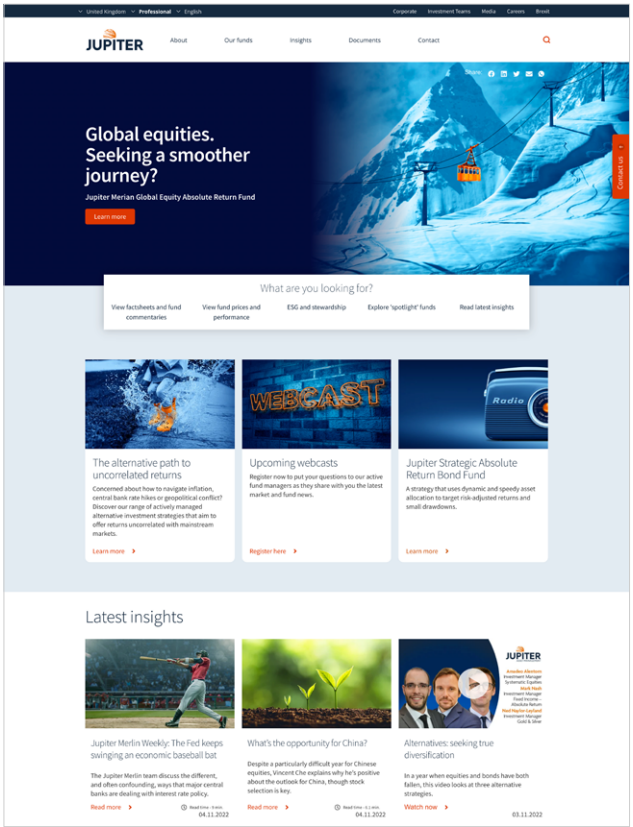


TCW

TCW's site is clean and easy to use, with the simple layout allowing you to get where you want to go very quickly. It's a great site to navigate and the high accessibility score speaks for itself.

This site is a good example of why a 'less is more' approach is so important for a fast and usable UI.

Google performance score 88 Lighthouse accessibility score 98



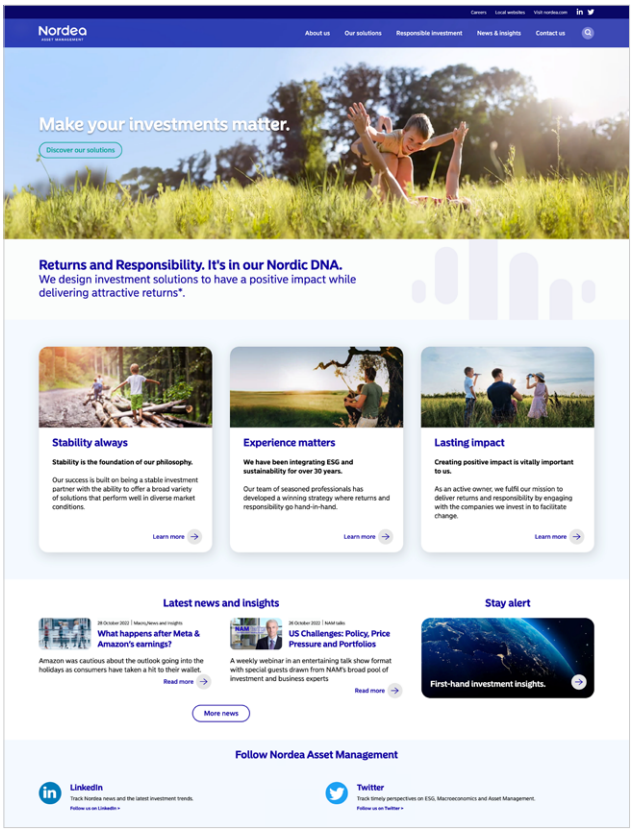
Jupiter

Jupiter's site makes an impact from the first load, with some smart design and interactive imagery / data further down the homepage. It also performs well when it comes to accessibility, with a top menu that's clear, uncluttered, and easy to navigate.

Similarly to some others, this site waits until the users go deeper into the site before you are faced with the attestations / role selectors, which again adds a nicer lead into the site removing that initial barrier.

The fund center is laid out well with some really nice filtering options relevant to users over internal classification and focus.

Google performance score 70 Lighthouse accessibility score 85



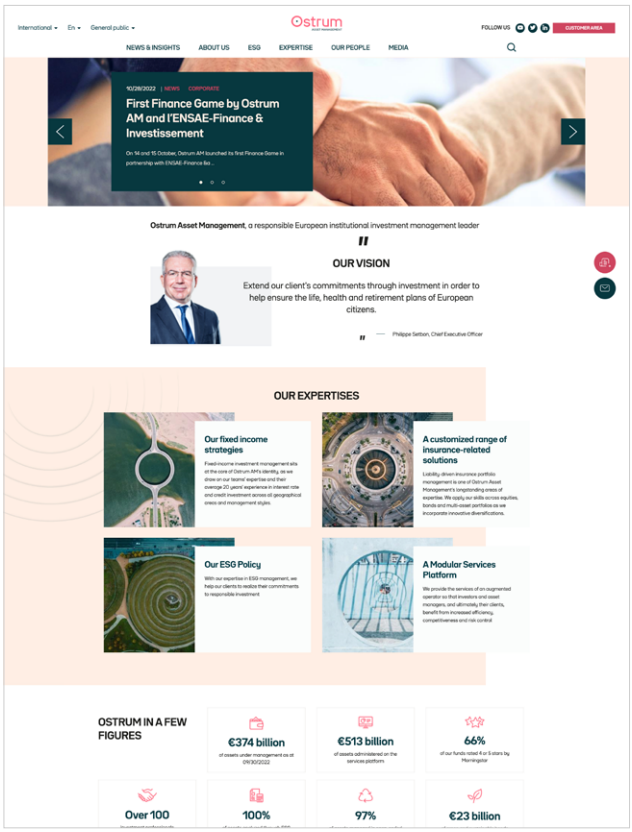
Nordea Asset Management

Nordea Asset Management's site is still going from strength to strength. It's a no-nonsense site with nordic design at its core. The straightforward modular layout that's easy to read, navigate, and find key information.

Colors are bold and the design has a clean, modern look that feels very at home in today's market. The website is also highly accessible,
opening generic investment product information and functionality to users of all backgrounds.

From a content perspective the site is rich with relevant copy, audio and some great video content which is authentic, well put together and easy to understand.

Google performance score 90 Lighthouse accessibility score 100

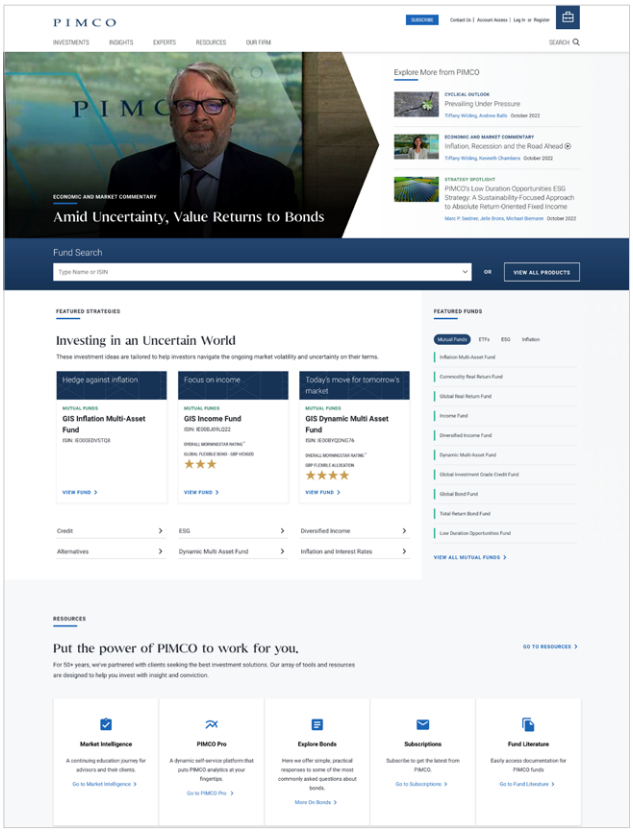


Ostrum

Ostrum's site uses clear, bold design to maximize your user experience. The font is large and very readable and navigation is a breeze. It's interesting to see Ostrum's social media presence so much at the fore on the homepage – a development we're sure we'll see more of in the industry.

We like the filter that's available when searching the funds. The options give you a few different ways of finding the information you're after.

Google performance score 46 Lighthouse accessibility score 60



Pimco

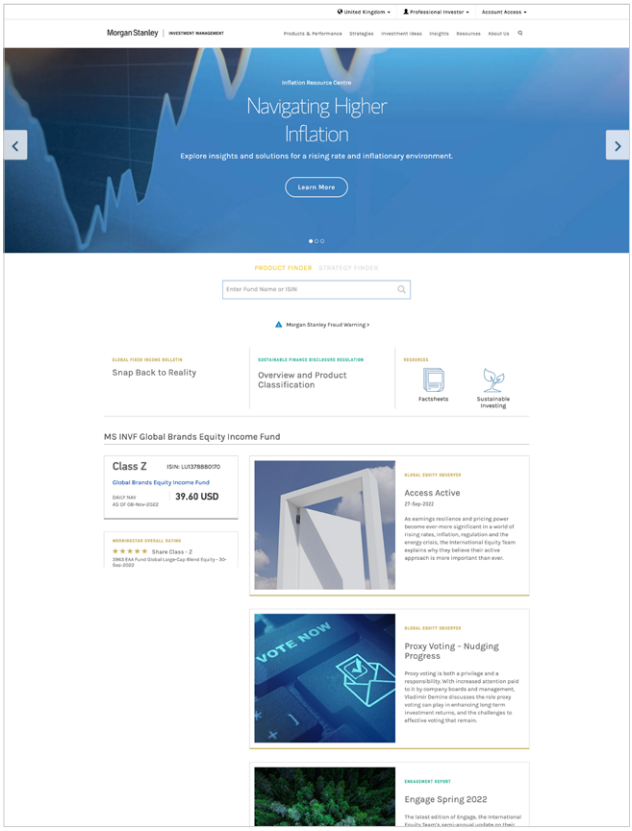
Pimco's site continues to impress in 2023, just as it did in our previous review.

Key content is laid out in a really thoughtful way resulting in a clean user interface. Uncluttered dropdowns from primary navigation make this a great site to drive.

Having fund information available straight from the homepage is a definite plus. Unlike many other investment management sites that hide this information deeper into the page or within a menu, Pimco's approach makes it a user-friendly experience.

The user experience is further enhanced with rich video content and well-put-together insights and resource center.

Google performance score 52 Lighthouse accessibility score 76

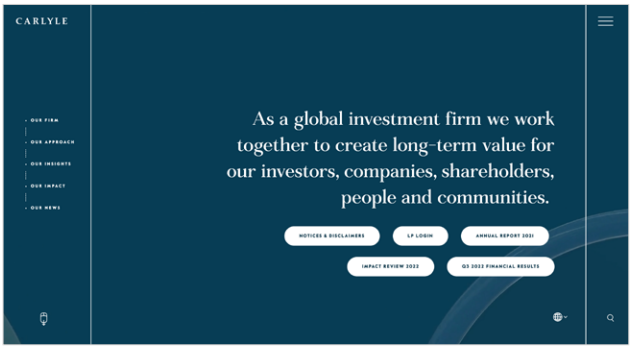


Morgan Stanley

Morgan Stanley's site is engaging from the start, making it easy for users to find the most popular funds or search for a specific fund by name.
The scrolling effect, where key fund details stay stationary while the related information scrolls up or down as you move the cursor, is a nice touch that improves the user experience.

Overall, Morgan Stanley's website is well-designed and user-friendly, making it easy for investors to find the information they need.

Google performance score 62 Lighthouse accessibility score 90



Carlyle Group

The Carlyle Group's site shows that you can (nearly) have everything when it comes to site design, some of us agree, but it was not a clean sweep across the panel.

It is considered more of a "brochure site" due to the limited information available, but what is noteworthy is the unique layout that includes alternative scrolling methods and eye-catching video montages and animations.

Despite the creative design choices, the website still allows for easy navigation using a keyboard, thus still ticking the accessibility box.

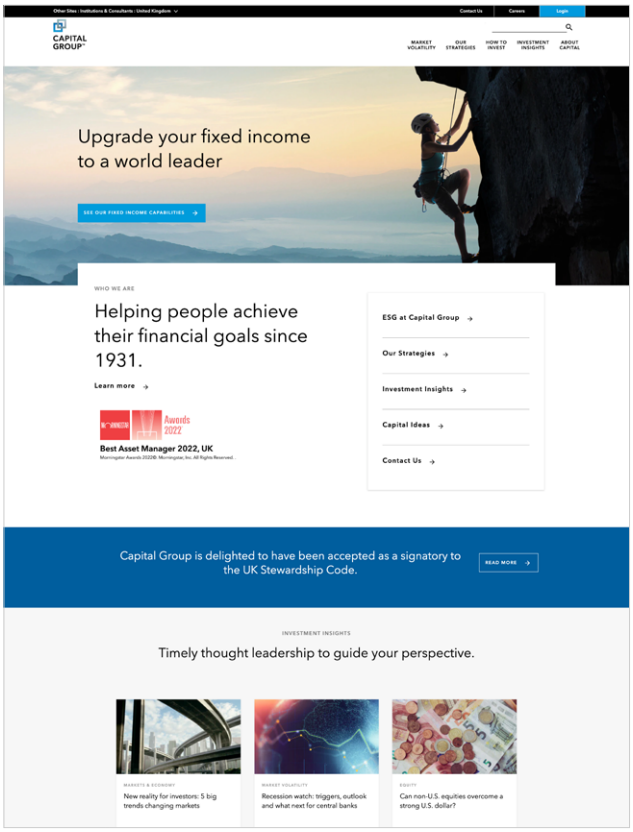
Google performance score 74 Lighthouse accessibility score 96

Our top sites for accessibility

Of our top picks, some deserved special mention for their accessibility levels and focus on the user journey. Our choices in this section have a clear focus on achieving excellent accessibility credentials. With the accessibility of a site becoming ever-more relevant in recent years, we believe it's important to highlight the leading players in this field.

These sites go a long way to improving the accessibility experience for end users – a goal that we believe every investment firm should be aiming for.





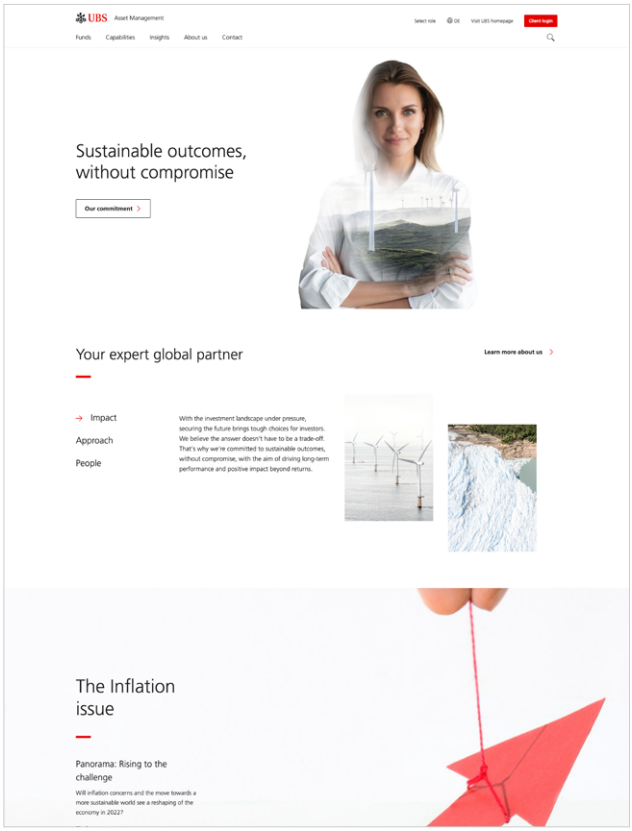
Capital Group

Capital Group's site meets most of our key metrics and excels when it comes to accessibility and usability.

What makes this site special is the accessibility functionality, with a feature that you can turn on to make the site easier to navigate for users that need it.

It seems that this feature can only load for some countries and not all (US but not UK, for example), and we'd love to see this rolled out globally by the firm.

Google performance score 50 Lighthouse accessibility score 90



UBS Asset Management

UBS Asset Management's site opts for a minimalist approach to site design, with the use of white space becoming an intentional part of the design and not just padding between sections. It looks classy and highly professional, but also extremely easy to navigate. Some real thought has gone into the layout and user interface (UI) delivering a great user experience (UX).

The site performs well with a keyboard and accessibility is excellent. Blocks clearly zoom in on the selected content, making it easier to read the text, data and key information. This is site design at its best and a hard act to beat for other firms in this category.

Google performance score 96 Lighthouse accessibility score 85

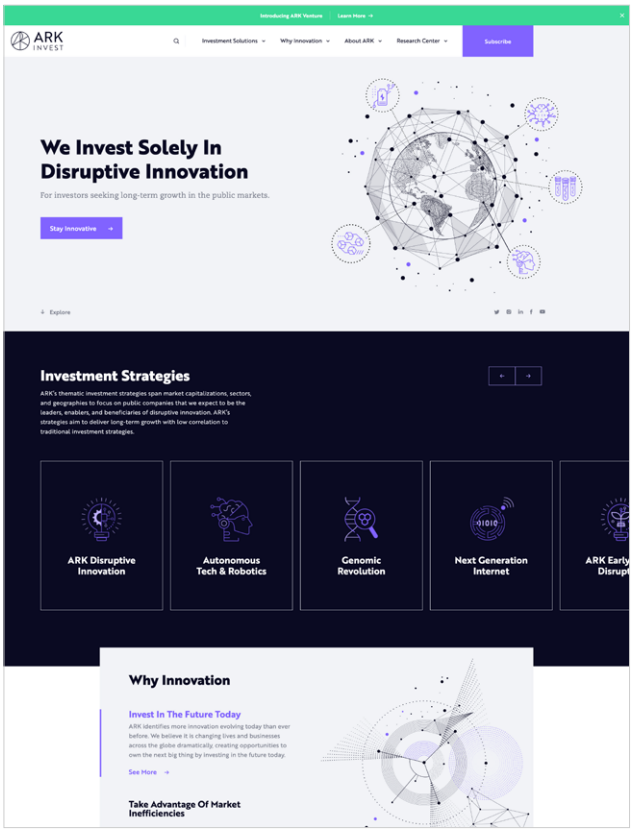
Our top sites for design

From our top picks, there were some sites that deserved an honorable mention for their innovative and eye-catching design work. Investment manager websites have a very clear and practical purpose – to help you access the fund information you need as quickly as possible. But this doesn't mean that the site design has to be boring, staid or unimaginative.

Sometimes a website did not tick all the boxes on certain usability features (especially being able to find fund factsheets [FS] quickly), yet they attracted our attention by pushing the boundaries beyond what is typical and showcasing the organization's culture and creativity.

The sites we've picked have all gone the extra mile when it comes to delivering innovative design – something we'd like to see a lot more of in the industry.





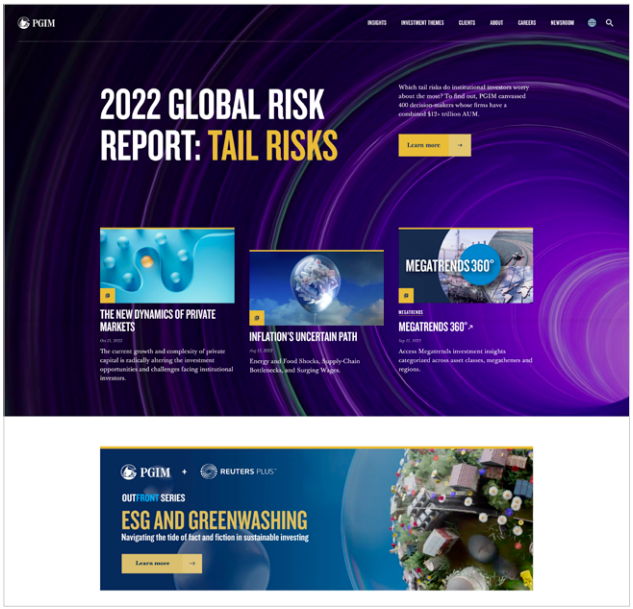
Ark Invest

Ark Invest's site makes a feature of the firm's brand color, making great use of purple to give the website a really clear identity. Who knew that purple could be used so well?

This is more of a 'brochure site' in its fundamental approach, with their funds and FS sitting under the ark-funds.com URL.

The site's use of clear icons, geometric shapes, and bold purple as a highlighting color firmly puts them in a niche that they can truly own.

Google performance score 63 Lighthouse accessibility score 81



PGIM

PGIM's site is beautifully designed, with subtle animations and bold colors to keep users interested. Some may find the bold design distracting, but we love it!

Their investment strategies (funds) could be lifted from the About Us heading and into the main site to simplify access and findability.

Cookies and user profiles don't pop-up immediately, but as you go through the site, thus removing some initial barrier to entry. On the whole, a site that is memorable, engaging and well-designed.

Google performance score 23 Lighthouse accessibility score 90

Pushing the boundaries of website design.

We've certainly seen some meaningful changes in the sites included in our top picks.



Although the speed and depth of change has slowed in recent years, there are ongoing incremental and meaningful changes being made. Sites are becoming easier to navigate and are placing a greater focus on seamlessly delivering the fund factsheets that investment managers need. The accessibility of many sites is continuing to move forward, showing that good site design coupled with an in-depth understanding of your end user will deliver a highly usable site.

We've seen examples of firms that are truly pushing the envelope, adding a spirit of innovation and creativity to a sector that can sometimes play it a little too safe. That creative drive is something we'd love to see more of, as the industry continues to reinvent itself.

Lead the way in digital innovation and investor experience

At Kurtosys, we're proud of our fast, scalable and easy-to-use website technology. We also love solving problems with creativity. We're proud to see some of our most valued clients demonstrating why they're the cream of the crop.

Keeping up with the evolution of website design can be a challenge. Technology, client expectations, regulations and industry needs are always changing, adding to the pressure to make your site stand out from the crowd.

Successful investment marketers prioritize:

- Keeping up with changing trends in web design
- Automating and simplifying difficult and costly processes
- Delivering critical data at pace and in the most accessible formats
- Updating user interfaces and website design

We are here to talk and share more use cases if you are looking to create a best in class hub for institutional investors, financial advisers and related audiences.

Talk to our team today to arrange a demo.

Stay in conversation about UX best practices for investment managers

Staying informed of advancements in website design and management ensures that you keep a competitive edge to your site at all times. Our team of designers and UX engineers regularly share their insights on the latest trends and developments in the field.

Here's a selection of related articles:

- Supporting the S in ESG – Why all investment managers should care about web accessibility
- Managing Global Investment Sites: Why investment management needs its own DXP
- Personalization in investment management: What it is and what it is not

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A secure cloud-based platform that seamlessly puts investment data & insight at your clients' fingertips.

Trusted by the world's largest and leading investment brands, Kurtosys has a team of over 180 collaborating globally every day to help investment managers succeed and scale.

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