ICI VIEWPOINTS
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ICI Report Provides Comprehensive Information on Fund Shareholders

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Today, we publish *Profile of Mutual Fund Shareholders, 2010*. The report contains a wealth of information on the 43.9 percent of U.S. households (representing 90.2 million investors) that own mutual funds. We invite you to peruse the study, which includes 90 charts and tables on shareholders' characteristics by age, employment status, household income, risk tolerance, and more.

The data we've gathered allows ICI to create a portrait of the "typical" mutual fund–owning head of household. In 2010, that person:

- was middle-aged, employed, educated, married or living with a partner, and shared investment decisionmaking with his or her spouse or partner;
- was of moderate financial means, with $80,000 in household income and $200,000 in household financial assets;
- owned investments other than mutual funds, including individual stocks, and had more than half of the household's financial assets (excluding the primary residence) invested in mutual funds;
- had $100,000 invested in four mutual funds, including at least one equity fund;
- owned mutual funds inside an employer-sponsored retirement plan, such as a 401(k) plan, 403(b) plan, 457 plan, SEP IRA, SAR-SEP IRA, or SIMPLE IRA;
- owned mutual funds outside employer-sponsored retirement plans, with the purchase of those funds taking place primarily through full-service brokers, independent financial planners, or other intermediaries; and
- was confident that mutual funds could help him or her reach financial goals.

For more information:

- Read *Profile of Mutual Fund Shareholders, 2010*.
- See also *Ownership of Mutual Funds, Shareholder Sentiment, and Use of the Internet, 2010*.
- See also *Characteristics of Mutual Fund Investors, 2010*.
- Find more ICI investor research.

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