

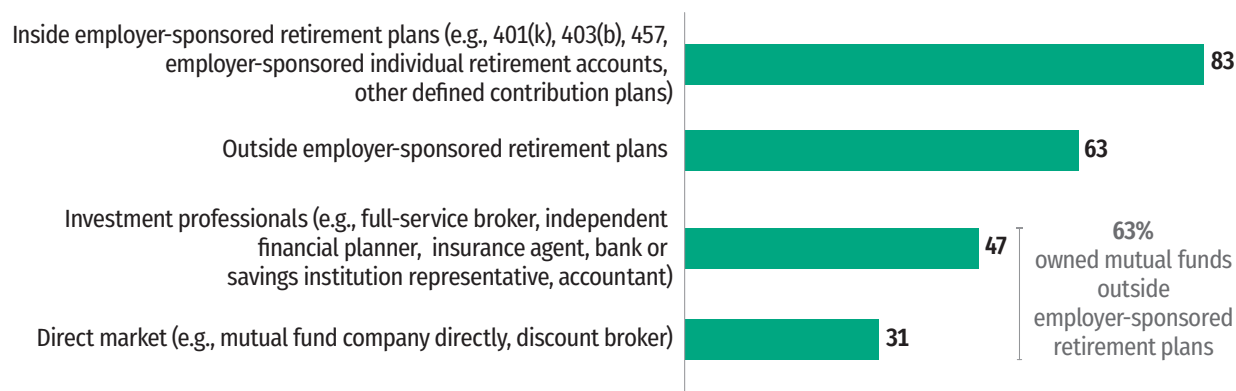
MAY 25, 2021

## Jump In for Mutual Fun

FIGURE 1

### Mutual Funds Can Be Held Through a Wide Range of Financial Services Firms

Percentage of mutual fund-owning households, 2020

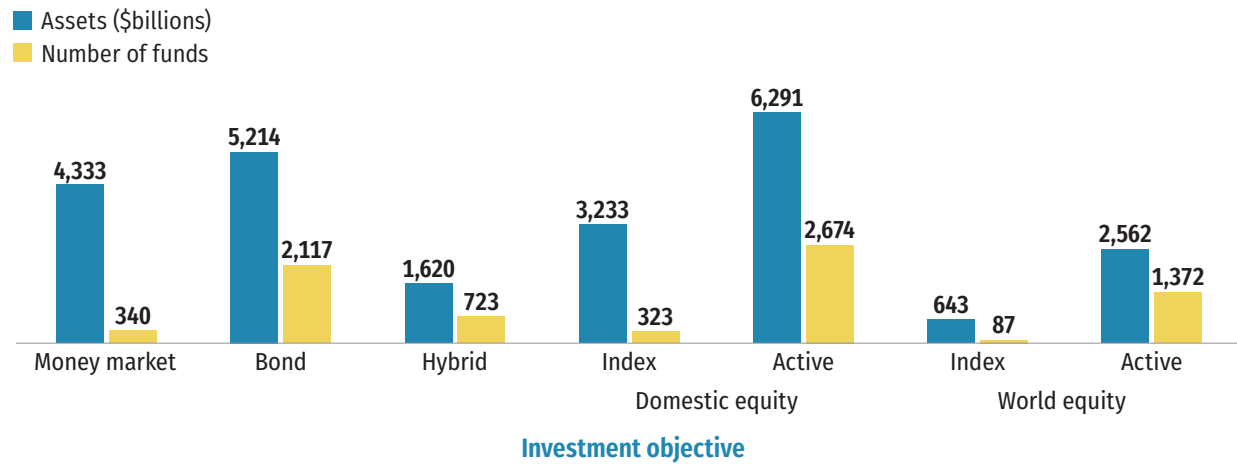


Source: Investment Company Institute Annual Mutual Fund Shareholder Tracking Survey

FIGURE 2

## Mutual Funds Offer an Amazing Array of Fund Investment Objectives

US-registered mutual funds; year-end 2020

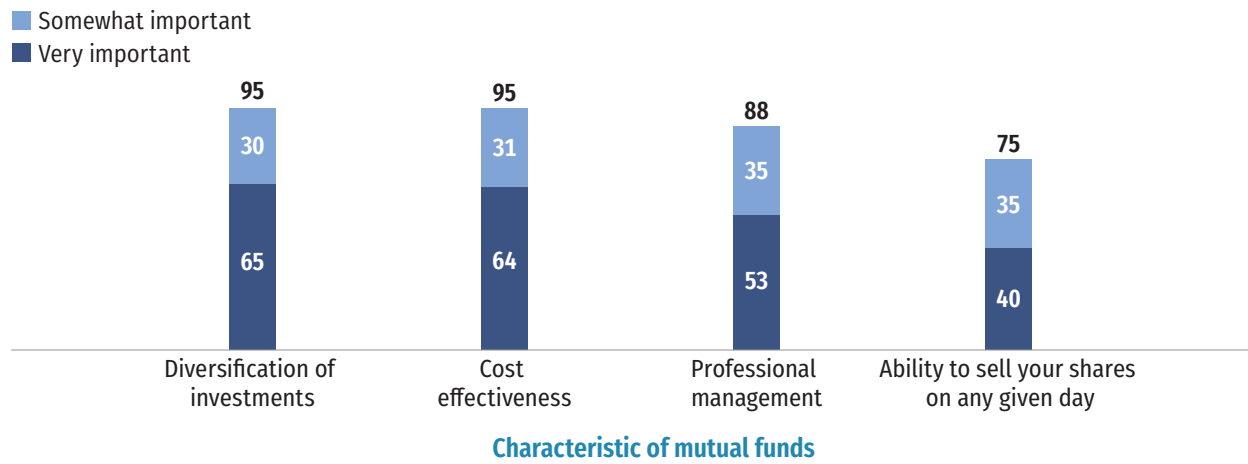


Note: Total mutual fund assets at year-end 2020 were \$23,896 billion; total number of mutual funds was 7,636, with an additional 1,391 funds of funds. Most hybrid and bond mutual fund assets were actively managed (\$5,904 billion) rather than indexed (\$930 billion) at year-end 2020.

FIGURE 3

### Mutual Fund Investors Appreciate the Four Hallmarks of Mutual Funds

Percentage of individuals owning mutual funds, fall 2020



Note: Figure reports the percentage of individuals owning mutual funds who indicated the characteristic was “very important” or “somewhat important;” the other responses were “not very important” or “not at all important.”

Source: ICI tabulation of NORC AmeriSpeak® survey data (fall 2020)