2017 Stable Value Study

Key Findings

Stable Value Widely Viewed as More Attractive Than Money Market
Among Plan Sponsors Familiar With Money Market Fund Reform

- 83% of plan sponsors believe stable value is more attractive
- 17% of plan sponsors believe money market is more attractive

Advisors Yield a Great Deal of Influence in Plan Sponsors’ Capital Preservation Selection, Yet There Is a Disconnect

What Plan Sponsors Believe Their Advisors Recommend

- 73% of plan sponsors with stable value say it was recommended to them by their advisor
- 67% of plan sponsors with money market say it was recommended to them by their advisor

What Advisors Say They Recommend

- 90% of advisors say they very often recommend stable value
- 86% of advisors say they seldom or never recommend money market

Areas of Opportunity for Plan Sponsor Education on Stable Value

Lack of Awareness About Stable Value Returns Over the Last 15 Years

- 44% of plan sponsors are unaware that stable value has outperformed money market
- 84% of plan sponsors are unaware that stable value returns have exceeded inflation

More Clarity Needed on Competing Fund Requirements

- 73% of plan sponsors with competing funds are confused about equity wash provisions