

Cerulli Quantitative Updates: Subscription Details

New: Cerulli's popular Quantitative Update series is now subscription-based and includes online access to all prior annual releases and related Thematic Reports. See below to find which reports are included with a subscription to each of our Quantitative Updates.

Subscription Topic	Release	Type
U.S. Topics		
1. Advisor Metrics		
1 Cerulli Quantitative Update: Advisor Metrics 2011	12/1/2011	Quantitative Update
2 Cerulli Quantitative Update: Advisor Metrics 2010	12/1/2010	Quantitative Update
3 Cerulli Quantitative Update: Advisor Metrics 2009	12/15/2009	Quantitative Update
4 Advisor Migration: The Changing Landscape of Retail Distribution 2009	8/31/2009	Thematic Report
5 Cerulli Quantitative Update: Advisor Metrics 2008	11/3/2008	Quantitative Update
6 Financial Planning: Trends in Advice Delivery 2008	7/15/2008	Thematic Report
7 Cerulli Quantitative Update: Advisor Metrics 2007	11/15/2007	Quantitative Update
8 Cerulli Quantitative Update: Advisor Metrics 2006	11/1/2006	Quantitative Update
9 Cerulli Quantitative Update: Advisor Metrics 2005	10/1/2005	Quantitative Update
10 Cerulli Quantitative Update: Advisor Satisfaction Metrics 2004	1/1/2005	Quantitative Update
11 Value of Advice 2003	12/1/2003	Thematic Report
12 Transitioning from Commissions to Fee-Based Pricing: Issues and Strategies 2003	5/1/2003	Thematic Report
2. High-Net-Worth Markets		
1 Cerulli Quantitative Update: High-Net-Worth and Ultra-High-Net-Worth Markets 2011	12/1/2011	Quantitative Update
2 Cerulli Quantitative Update: High-Net-Worth and Ultra-High-Net Worth Markets 2010	12/1/2010	Quantitative Update
3 Cerulli Quantitative Update: High-Net-Worth and Ultra-High-Net Worth Markets 2009	12/15/2009	Quantitative Update
4 Bank Trusts: Wealth Management and Distribution in a Fiduciary Setting 2009	8/31/2009	Thematic Report
5 Cerulli Quantitative Update: High-Net-Worth and Ultra-High-Net Worth Markets 2008	9/30/2008	Quantitative Update
6 Private Wealth Groups 2006	6/1/2006	Thematic Report
7 Hedge Funds: The Market for Absolute Return 2005	11/1/2005	Thematic Report
8 Wealth Transfer: Product and Advice Solutions 2004	7/1/2004	Thematic Report
9 Asset Management: Private Client Groups 2004	1/1/2004	Thematic Report
3. Institutional Markets		
1 Investment Consultants: A Strategic Outlook 2003	9/17/2003	Thematic Report
2 Asset Management: Institutional Sales & Marketing 2004	6/1/2004	Thematic Report
3 U.S. Subadvisory Marketplace: Metrics for Strategic Assessment and Business Planning 2004	12/1/2004	Thematic Report
4 Institutional Sales and Relationship Management 2007	7/1/2007	Thematic Report
5 Pension and Investment Consulting: Insight for Asset Managers in DB and DC 2008	8/15/2008	Thematic Report
6 Trends and Opportunities in Subadvisory 2008	6/1/2008	Thematic Report
4. Insurance and Annuities		
1 Cerulli Quantitative Update: Annuities and Insurance 2011	7/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Annuities and Insurance 2010	4/30/2010	Quantitative Update
3 Variable Annuity Asset Management: Growing Assets in a New Environment 2009	10/15/2009	Thematic Report
4 Cerulli Quantitative Update: Annuities and Insurance 2009	4/30/2009	Quantitative Update
5 Wealth Transfer: Sizing Trends and Opportunities 2008	11/30/2008	Thematic Report
6 Cerulli Quantitative Update: Annuities and Insurance 2008	5/15/2008	Quantitative Update
7 State of the Variable Insurance Industry 2007	11/30/2007	Thematic Report
8 Cerulli Quantitative Update: Insurance 2007	2/15/2007	Quantitative Update
9 Insurance Product Distribution Opportunities 2006	7/10/2006	Thematic Report
10 Retirement Income: Positioning for Success 2005	10/1/2005	Thematic Report
11 Wealth Transfer: Product and Advice Solutions 2004	7/1/2004	Thematic Report
5. Intermediary Markets		
1 Cerulli Quantitative Update: Intermediary Distribution 2011	10/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Intermediary Markets 2010	8/15/2010	Quantitative Update
3 State of the Wirehouses 2009	11/28/2009	Thematic Report
4 Cerulli Special Report: Market Update: RIA Channel Sizing and Assessment 2009	10/8/2009	Special Report
5 Cerulli Quantitative Update: Intermediary Markets 2009	9/15/2009	Quantitative Update
6 State of Independent Broker/Dealers: Channel Sizing and Industry Implications 2008	12/10/2008	Thematic Report
7 Cerulli Quantitative Update: Intermediary Markets 2008	6/30/2008	Quantitative Update
8 Cerulli Quantitative Update: Intermediary Markets 2007	7/30/2007	Quantitative Update
9 Registered Investment Advisors 2007	10/30/2007	Thematic Report
10 State of Wholesaling: Next-Generation Coverage Models 2006	9/15/2006	Thematic Report
11 Cerulli Quantitative Update: Intermediary Markets 2006	6/15/2006	Quantitative Update
12 Cerulli Quantitative Update: Intermediary Markets 2005	10/1/2005	Quantitative Update
13 Retail Registered Investment Advisors in Transition 2005	8/1/2005	Thematic Report
14 Cerulli Quantitative Update: Intermediary Markets 2004	10/1/2004	Quantitative Update
15 Cerulli Quantitative Update: Intermediary Markets 2003	9/1/2003	Quantitative Update
16 Transitioning from Commissions to Fee-Based Pricing: Issues and Strategies 2003	5/1/2003	Thematic Report
17 The State of Retail Registered Investment Advisor Market 2002	7/1/2002	Thematic Report

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Subscription Topic	Release	Type
6. Managed Accounts		
1 Cerulli Quantitative Update: Managed Accounts 2011	11/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Managed Accounts 2010	11/1/2010	Quantitative Update
3 Cerulli Quantitative Update: Managed Accounts 2009	11/15/2009	Quantitative Update
4 Cerulli Special Report: Managed Account Due Diligence Groups 2009	8/15/2009	Special Report
5 State of Managed Accounts: Industry Outlook 2009	6/30/2009	Thematic Report
6 Cerulli Quantitative Update: Managed Accounts 2008	11/1/2008	Quantitative Update
7 Managed Accounts: Economics of Asset Managers, Sponsors, and Advisors 2008	9/30/2008	Thematic Report
8 Cerulli Quantitative Update: Managed Accounts 2007	12/15/2007	Quantitative Update
9 Managed Accounts: Impact of Overlay on Asset Managers 2007	11/15/2007	Thematic Report
10 Cerulli Quantitative Update: Managed Accounts 2006	11/15/2006	Quantitative Update
11 State of Managed Accounts 2006	8/1/2006	Thematic Report
12 Managed Account Groups: Impact on Future Distribution 2005	12/1/2005	Thematic Report
13 Cerulli Quantitative Update: Managed Accounts 2005	11/1/2005	Quantitative Update
14 Outsourcing Trends: Opportunities and Challenges for Intermediaries and Third-Party Vendors 2005	8/1/2005	Thematic Report
15 Cerulli Quantitative Update: Managed Accounts 2004	11/1/2004	Quantitative Update
16 Cerulli Quantitative Update: Managed Accounts 2003 Program Sponsors 2004	2/1/2004	Quantitative Update
17 Cerulli Quantitative Update: Managed Accounts 2003 Asset Managers 2003	7/24/2003	Quantitative Update
18 Mgd Accounts: The State of Broker/Dealer Programs 2002	12/1/2002	Thematic Report
19 Asset Mgt: Operations and Profitability Benchmarks for Sep Acct Consultant Programs 2002	3/1/2002	Thematic Report
7. Retail Alternative Products and Strategies		
1 Cerulli Quantitative Update: Retail Alternative Products and Strategies 2011	4/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Alternative Products and Strategies 2010	3/15/2010	Quantitative Update
3 Exchange-Traded Funds: Threat or Threatened? 2009	11/15/2009	Thematic Report
4 Alternative Investments in the Retail Marketplace: Evaluating Opportunities and Growth 2008	12/15/2008	Thematic Report
5 Cerulli Quantitative Update: Product Strategy 2007	4/9/2007	Quantitative Update
6 Hedge Funds: The Market for Absolute Return 2005	11/1/2005	Thematic Report
7 Mutual Fund Alternatives: Distribution Trends and Advisor Utilization 2004	2/1/2004	Thematic Report
8. Retail Investor Product Usage		
1 Cerulli Quantitative Update: Retail Investor Product Usage 2011	9/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Retail Investor Product Usage 2010	5/15/2010	Quantitative Update
3 Cerulli Quantitative Update: Retail Investor Metrics 2009	5/15/2009	Quantitative Update
4 Navigating the Emerging Affluent Marketplace 2006	2/1/2006	Thematic Report
5 Retirement Income: Positioning for Success 2005	10/1/2005	Thematic Report
6 Wealth Transfer: Product and Advice Solutions 2004	7/1/2004	Thematic Report
7 Mass Market Advice: Challenges and Opportunities 2004	2/1/2004	Thematic Report
8 Funding Retirement Income: Impact on Managers and Distributors 2002	9/1/2002	Thematic Report

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9. Retail Investor Provider Relationships		
1 Cerulli Quantitative Update: Retail Investor Provider Relationships 2011	12/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Retail Investor Provider Relationships 2010	10/15/2010	Quantitative Update
3 Cerulli Quantitative Update: Retail Investor Metrics 2009	5/15/2009	Quantitative Update
4 Navigating the Emerging Affluent Marketplace 2006	2/1/2006	Thematic Report
5 Retirement Income: Positioning for Success 2005	10/1/2005	Thematic Report
6 Wealth Transfer: Product and Advice Solutions 2004	7/1/2004	Thematic Report
7 Mass Market Advice: Challenges and Opportunities 2004	2/1/2004	Thematic Report
8 Funding Retirement Income: Impact on Managers and Distributors 2002	9/1/2002	Thematic Report
10. Retail Product Marketing & Sales		
1 Cerulli Quantitative Update: Retail Product Marketing and Sales 2011	11/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Retail Product Marketing and Sales Organizations 2010	9/15/2010	Quantitative Update
3 Cerulli Quantitative Update: Retail Product Marketing and Sales Organizations 2009	9/15/2009	Quantitative Update
4 Cerulli Quantitative Update: Retail Product Marketing and Sales Organizations 2008	7/15/2008	Quantitative Update
5 Cerulli Quantitative Update: Product Strategy 2007	4/9/2007	Quantitative Update
6 Asset Management: Next-Generation Strategic Marketing Organizations 2005	8/1/2005	Thematic Report
7 Asset Management: A Product Strategy Framework 2004	4/1/2004	Thematic Report
11. Retail Products and Strategies		
1 Cerulli Quantitative Update: Retail Products and Strategies 2011	10/3/2011	Quantitative Update
2 Cerulli Quantitative Update: Retail Products and Strategies 2010	6/15/2010	Quantitative Update
3 Cerulli Special Report: Target-Date Funds: Still Viable? 2009	6/30/2009	Special Report
4 Cerulli Quantitative Update: Retail Products and Strategies 2009	3/31/2009	Quantitative Update
5 Product Development in an Evolving Portfolio Construction Environment 2008	6/15/2008	Thematic Report
6 Cerulli Quantitative Update: Product Strategy 2007	4/9/2007	Quantitative Update
7 Asset Management: Next-Generation Strategic Marketing Organizations 2005	8/1/2005	Thematic Report
8 Mutual Fund Revenue Sharing: Current Practices and Projected Implications 2005	2/1/2005	Thematic Report
9 Asset Management: Conquering Compliance Challenges 2004	11/1/2004	Thematic Report
10 Asset Management: A Product Strategy Framework 2004	4/1/2004	Thematic Report
12. Retirement Markets		
1 Cerulli Quantitative Update: Retirement Markets 2011	12/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Retirement Markets 2010	12/15/2010	Quantitative Update
3 Cerulli Quantitative Update: Retirement Markets 2009	12/15/2009	Quantitative Update
4 State of Retirement Income: Addressable Opportunity Strategies and Future Outlook 2009	9/30/2009	Thematic Report
5 IRA Rollover and Retention Strategies and Positioning 2008	9/15/2008	Thematic Report
6 Pension and Investment Consulting: Insight for Asset Managers in DB and DC 2008	8/15/2008	Thematic Report
7 Cerulli Quantitative Update: Retirement Markets 2008	12/1/2008	Quantitative Update
8 Cerulli Quantitative Update: Retirement Markets 2007	12/5/2007	Quantitative Update
9 DC and DB in the Megaplan Marketplace 2007	8/30/2007	Thematic Report
10 Institutional Sales and Relationship Management 2007	7/1/2007	Thematic Report
11 State of the 403(b) and 457 Marketplace 2007	5/1/2007	Thematic Report
12 Cerulli Quantitative Update: Retirement Markets 2006	12/15/2006	Quantitative Update
13 State of the 401(k) Marketplace 2006	10/15/2006	Thematic Report
14 Cerulli Quantitative Update: Retirement Markets 2005	12/1/2005	Quantitative Update
15 Retirement Income: Positioning for Success 2005	10/1/2005	Thematic Report
16 Cerulli Quantitative Update: Retirement Markets 2004	12/1/2004	Quantitative Update
17 Capturing and Retaining Rollovers: Positioning for Success 2004	8/1/2004	Thematic Report
18 Retirement Industry Update 2003	12/1/2003	Quantitative Update
19 A Competitive Outlook for the 529 Market 2003	5/1/2003	Thematic Report
20 Funding Retirement Income: Impact on Managers and Distributors 2002	9/1/2002	Thematic Report
13. U.S. Retail and Institutional Asset Management		
1 Cerulli Quantitative Update: The State of U.S. Retail and Institutional Asset Management 2011	9/15/2011	Quantitative Update
2 Cerulli Quantitative Update: The State of U.S. Retail and Institutional Asset Management 2010	8/1/2010	Quantitative Update
3 Cerulli Quantitative Update: The State of U.S. Retail and Institutional Asset Management 2009	8/1/2009	Quantitative Update
4 Cerulli Quantitative Update: The State of U.S. Retail and Institutional Asset Management 2008	10/15/2008	Quantitative Update
5 Best Practices for Portfolio Management Organizations 2008	7/25/2008	Thematic Report
6 Trends and Opportunities in Subadvisory 2008	6/1/2008	Thematic Report
7 Cerulli Quantitative Update: Asset Manager Addressable Marketplaces 2007	9/30/2007	Quantitative Update
8 Institutional Sales and Relationship Management 2007	7/1/2007	Thematic Report
9 Cerulli Quantitative Update: Asset Manager Addressable Marketplace 2006	9/1/2006	Quantitative Update
10 U.S. Multiaffiliate Marketplace 2006	3/16/2006	Thematic Report
11 Evaluating Asset Manager Addressable Marketplaces 2005	8/1/2005	Thematic Report

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12 Professional Buyers and Manager Selection 2005	6/1/2005	Thematic Report
13 U.S. Subadvisory Marketplace: Metrics for Strategic Assessment and Business Planning 2004	12/1/2004	Thematic Report
14 Asset Management: Institutional Sales & Marketing 2004	6/1/2004	Thematic Report
15 Investment Consultants: A Strategic Outlook 2003	9/17/2003	Thematic Report
International Topics		
14. Asian Distribution Dynamics		
1 Cerulli Quantitative Update: Asian Distribution Dynamics 2011	11/30/2011	Quantitative Update
2 Cerulli Quantitative Update: Asian Distribution Dynamics 2010	11/1/2010	Quantitative Update
3 Asset Management in India: Revenue Cost and Profitability 2009	11/30/2009	Thematic Report
4 Cerulli Quantitative Update: Asian Distribution Dynamics 2009	11/30/2009	Quantitative Update
5 Cerulli Quantitative Update: Asian Distribution Dynamics 2008	10/30/2008	Quantitative Update
6 Opportunities in Asia's Unit-Linked Investment Marketplace 2008	9/15/2008	Thematic Report
7 Cerulli Quantitative Update: Asian Distribution Dynamics 2007	9/15/2007	Quantitative Update
8 Cerulli Quantitative Update: Asian Distribution Dynamics 2006	9/1/2006	Quantitative Update
9 Asian Distribution Dynamics 2005	8/1/2005	Quantitative Update
10 Asian Distribution Dynamics 2004	9/1/2004	Thematic Report
11 Market Update: Asian Distribution Dynamics 2003	6/1/2003	Thematic Report

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15. Asia Institutional Asset Management		
1 Cerulli Quantitative Update: Institutional Asset Management in Asia 2011	10/12/2011	Quantitative Update
2 Cerulli Quantitative Update: Institutional Asset Management in Asia 2010	12/15/2010	Quantitative Update
3 Cerulli Quantitative Update: Institutional Asset Management in Asia 2009	2/28/2009	Quantitative Update
4 Asian Insurance: Outsourcing Opportunities 2007	5/1/2007	Thematic Report
16. China		
1 Cerulli Quantitative Update: China 2011	11/1/2011	Quantitative Update
2 Cerulli Quantitative Update: China 2010	11/30/2010	Quantitative Update
3 Cerulli Quantitative Update: China 2009	10/30/2009	Quantitative Update
4 Cerulli Quantitative Update: Asset Management Opportunities in China 2008	12/15/2008	Quantitative Update
5 Cerulli Quantitative Update: Asset Management in China and India 2007	11/1/2007	Quantitative Update
6 China & India 2006	10/1/2006	Thematic Report
7 China & India 2005	9/1/2005	Thematic Report
17. European Affluent Investor		
1 Cerulli Quantitative Update: European Affluent Investor Analysis 2012	9/30/2012	Quantitative Update
2 Navigating the Emerging Affluent Marketplace 2006	2/1/2006	Thematic Report
3 Wealth Transfer: Product and Advice Solutions 2004	7/1/2004	Thematic Report
4 European Advisor Distribution 2004	6/1/2004	Thematic Report
18. European Defined Contribution Markets		
1 Cerulli Quantitative Update: European Defined Contribution Markets 2011	10/31/2011	Quantitative Update
2 Asset Management Trends in Eastern Europe 2006	12/15/2006	Thematic Report
3 European Distribution Dynamics 2005	12/1/2005	Thematic Report
4 European Advisor Distribution 2004	6/1/2004	Thematic Report
19. European Distribution Dynamics		
1 Cerulli Quantitative Update: European Distribution Dynamics 2012	3/31/2012	Quantitative Update
2 Asset Management Trends in Eastern Europe 2006	12/15/2006	Thematic Report
3 European Distribution Dynamics 2005	12/1/2005	Thematic Report
4 European Advisor Distribution 2004	6/1/2004	Thematic Report
20. Global Funds of Funds		
1 Cerulli Quantitative Update: European Funds of Funds 2011	10/31/2011	Quantitative Update
2 Cerulli Special Report: Exchange-Traded Funds in Europe: Challenges for Asset Managers 2009	11/15/2009	Special Report
3 Asset Management Trends in Eastern Europe 2006	12/15/2006	Thematic Report
4 European Distribution Dynamics 2005	12/1/2005	Thematic Report
5 European Advisor Distribution 2004	6/1/2004	Thematic Report
21. Global Markets		
1 Cerulli Quantitative Update: Global Markets 2011	6/25/2011	Quantitative Update
2 Cerulli Quantitative Update: Global Markets 2010	6/30/2010	Quantitative Update
3 Cerulli Quantitative Update: Global Markets 2009	6/30/2009	Quantitative Update
4 Cerulli Quantitative Update: Global Markets 2008	6/30/2008	Quantitative Update
5 Asset Management in the Middle East 2008	1/31/2008	Thematic Report
6 Cerulli Quantitative Update: Global Markets 2007	7/1/2007	Quantitative Update
7 Eastern Europe 2006	12/1/2006	Thematic Report
8 Cerulli Global Update: Mid-Year 2006	11/15/2006	Quantitative Update
9 Cerulli Global Update: Year-End 2005	6/15/2006	Quantitative Update
10 Cerulli Global Update: Mid-Year 2005	10/1/2005	Quantitative Update
11 European Distribution Dynamics 2005	12/1/2005	Thematic Report
12 Cerulli Global Update: Year-End 2004	3/1/2005	Quantitative Update
13 Cerulli Global Update: Mid Year 2004	10/1/2004	Quantitative Update
14 European Advisor Distribution 2004	6/1/2004	Thematic Report
15 Cerulli Global Update: Mid Year 2003	9/1/2003	Quantitative Update
16 Cerulli Global Update: Year-End 2003	3/1/2004	Quantitative Update
17 Cerulli Global Update: Mid-Year 2002	6/1/2002	Quantitative Update
18 Cerulli Global Update: Year-End 2002	12/1/2002	Quantitative Update
22. Global Multimanager		
1 Cerulli Quantitative Update: Global Multimanager Products 2009	10/15/2009	Quantitative Update
2 Cerulli Quantitative Update: Global Multimanager Products 2008	11/30/2008	Quantitative Update
3 Cerulli Quantitative Update: Global Multimanager Products 2007	12/5/2007	Quantitative Update
4 Cerulli Quantitative Update: Global Multimanager Products 2006	11/15/2006	Quantitative Update
5 Cerulli Quantitative Update: Global Multimanager Products 2005	6/1/2005	Quantitative Update
6 Cerulli Quantitative Update: Global Multimanager Products 2004	9/1/2004	Quantitative Update
7 The Global Multimanager and Mutual Fund Subadvisory Markets 2003	5/1/2003	Thematic Report

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23. India		
1 Cerulli Quantitative Update: Asset Management Opportunities in India 2008	5/30/2008	Quantitative Update
2 Cerulli Quantitative Update: Asset Management in China and India 2007	11/1/2007	Quantitative Update
3 Mutual Fund Distribution in India 2007	2/28/2007	Thematic Report
4 China & India 2006	10/1/2006	Thematic Report
5 China & India 2005	9/1/2005	Thematic Report
24. Japan		
1 Cerulli Quantitative Update: Japan 2008	11/15/2008	Quantitative Update
2 Cerulli Quantitative Update: Japanese Market Profile 2007	11/1/2007	Quantitative Update
3 Cerulli Quantitative Update: Japanese Market Overview 2006	12/15/2006	Quantitative Update
4 Japanese Market Profile 2005	3/1/2005	Quantitative Update
5 Solutions For Japan 2003	8/21/2003	Thematic Report
25. Latin America		
1 Cerulli Quantitative Update: Latin American Distribution Dynamics 2011	8/31/2011	Quantitative Update
2 Cerulli Quantitative Update: Latin American Distribution Dynamics 2010	8/30/2010	Quantitative Update
3 Cerulli Quantitative Update: Latin American Distribution Dynamics 2009	8/30/2009	Quantitative Update
4 Cerulli Quantitative Update: Latin American Distribution Dynamics 2008	8/30/2008	Quantitative Update
5 Cerulli Quantitative Update: Latin American Distribution Dynamics 2007	9/1/2007	Quantitative Update
6 Trends in the Colombian Asset Management Marketplace 2007	1/15/2007	Thematic Report
7 Cerulli Quantitative Update: Latin American Distribution Trends 2006	8/1/2006	Quantitative Update
8 Trends in the Latin American Private Client Marketplace 2004	12/1/2004	Thematic Report
9 Trends Among Latin American Institutional Investors 2003	12/1/2003	Thematic Report
26. Southeast Asia		
1 Cerulli Quantitative Update: Southeast Asia 2011	5/15/2011	Quantitative Update
2 Cerulli Quantitative Update: Southeast Asia 2010	5/15/2010	Quantitative Update
3 Cerulli Quantitative Update: Southeast Asia 2009	5/31/2009	Quantitative Update
4 Shariah Investing: Market Sizing & Analysis 2008	12/15/2008	Thematic Report
5 Cerulli Quantitative Update: Southeast Asia 2008	5/15/2008	Quantitative Update
6 Asset Management in Southeast Asia 2007	4/11/2007	Thematic Report





