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Investors Experience Devastating Investor Performance Gap

DALBAR Study Reveals Historical Underperformance, Proposes a Cure

(Marlborough, MA. March 31, 2022) [DALBAR, Inc.'s QAIB report \(Quantitative Analysis of Investor Behavior\)](#) has been the nation's leading study on investor behavior for the past 28 years. This year's report, published on March 31st, contains alarming findings that paint a grim picture of how the Average Investor behaved and performed in 2021.

The study found that the Average Equity Fund Investor earned more than 10% less than the S&P 500 (18.39% vs. 28.71%), which marked the 3rd largest underperformance ever observed by the QAIB study, which looks back to 1985. Other notable findings from the study include rapidly rising inflation (7.04% in 2021), the superior performance of index fund investors, and the introduction of [a new asset allocation strategy](#) designed to improve investor behavior and investment returns.

DALBAR is hosting a complimentary Virtual Presentation to discuss the results of this study and action steps for advisors to be held on [Tuesday, April 5th at 11:00am ET](#) and [Thursday, April 7th at 2:00pm ET](#).

"If we go back two years, 2020 was a great year for the Average Investor. Despite very challenging market conditions, investors were able to limit the performance gap to just 1.31%." said Cory Clark, Chief Marketing Officer at DALBAR, Inc. "As good as 2020 was for the Average Investor, it was that bad and then some in 2021. The performance gap skyrocketed from a respectable 131 basis points to a shocking 1,032 basis points. This should be a sign for the financial services community that the public needs your help to improve their investor behavior and investment success."

The [full report of the 28th Edition of DALBAR's Quantitative Analysis of Investor Behavior \(QAIB\)](#) is now available. Professionals interested in attending one of next week's webinars can sign up by choosing one of the times listed above.

[DALBAR, Inc.](#) has a 45-year history and is recognized by industry and government as an independent third-party expert in the business of providing audits, evaluations, ratings, and due diligence. DALBAR certifications are recognized as a mark of excellence in the financial services community.