

FOR IMMEDIATE RELEASE

**E\*TRADE Media Relations**

Thayer Fox  
646-521-4418  
[thayer.fox@etrade.com](mailto:thayer.fox@etrade.com)

**E\*TRADE Investor Relations**

Brett Goodman  
646-521-4406  
[brett.goodman@etrade.com](mailto:brett.goodman@etrade.com)

**U.S. EQUITIES THE TOP CHOICE FOR INVESTORS**



**E\*TRADE®**

**66% ARE BULLISH**

AMIDST FALLING GAS PRICES  
AND TROUBLE ABROAD

*With bullish sentiment at the highest level in a year,  
experienced investors look to invest in U.S. stocks*

**NEW YORK, January 29, 2015** — E\*TRADE Financial Corporation (NASDAQ: ETFC) today announced results from the most recent wave of *StreetWise*, E\*TRADE's quarterly tracking study of experienced investors. Results indicate that investors are eager to participate in the market this quarter and are keenly interested in U.S. large-cap equities.

Concerning market sentiment, 66 percent bullish:

- 66 percent are bullish, up seven percentage points from last quarter and at the highest level since Q1 2014.
- 47 percent — and 60 percent of active investors — agree that the drop in oil prices and therefore lower gas prices result in more disposable income for them to invest in the markets.

Concerning assets, individual stocks most preferred:

- Individual stocks are the most preferred asset class in which to invest, at 68 percent, up 6 percentage points from last quarter and at the highest level since Q1 2014, while investors are most comfortable investing in large-cap U.S. equities, at 61 percent — the highest of any category.

- Equity mutual funds are the second-most preferred asset class, at 60 percent, up 5 percentage points from last quarter.
- Only 29 percent of investors prefer investing in bonds, down 7 percentage points from last quarter and the lowest level since Q1 2014.

Concerning sectors, health care most favorable:

- Health care remains the most preferred sector, with 56 percent of investors preferring it, up 1 percentage point from last quarter.
- Information technology, with 44 percent of investors preferring it, replaces energy as the second most preferred. Energy drops 14 percentage points to 35 percent of investors preferring it.

“Investors clearly sense opportunity in the market,” said George Fischer, VP, Trading, Margin Lending and Cash Management at E\*TRADE Financial. “But spotting potential opportunities is only half the battle. The next step is using the right tools to move from ideation to execution.”

For those investors interested in finding the right investments in today’s market environment, Mr. Fischer offered the following:

- **Define the universe.** Before searching for new positions, form a comprehensive picture of what the right asset looks like for your portfolio. For example, if your focus is large-cap U.S. equities, screeners can help focus your universe by a host of key characteristics, including dividend yield, P/E ratio and industry. In fact, experienced investors rate screeners, which you can find on [etrade.com](http://etrade.com), as the most useful tool when looking for investments.
- **Establish your target allocation.** Evaluate the potential suitability, risk and return of a new position, making sure it fits within your larger investment goals and will not overexpose your portfolio to any one sector or asset class. E\*TRADE offers both [risk and portfolio analyzer tools](#) to help determine proper allocation.
- **Pick your entry.** While it is impossible to time the market, there are signals that help evaluate when to execute. A combination of fundamental analysis, like research and earnings reports, and technical analysis, like charting, can help you better understand the cyclicity of how a sector or stock interacts with the market and when it may be an appropriate time to engage.
- **Manage the position over time.** Review and rebalance your portfolio, mapping it back to your target allocation every six months, or as market valuations change. The value and class of the assets in your portfolio will change as the companies that underlie them evolve.

E\*TRADE empowers smarter investing by balancing today’s needs with tomorrow’s goals through access to curated content and insights with actionable tools — complemented by professional guidance — online and from seasoned financial consultants. To learn more about E\*TRADE’s trading and investing platforms and tools, visit [etrade.com](http://etrade.com).

For useful insight from E\*TRADE and third-party investment professionals, follow the company on Twitter, [@ETRADE](https://twitter.com/ETRADE).

### **About E\*TRADE Financial**

E\*TRADE Financial and its subsidiaries provide financial services including online brokerage and related banking products and services to retail investors. Specific business segments include Trading and Investing and Balance Sheet Management. Securities products and services, including stocks, bonds and mutual funds, are offered by E\*TRADE Securities LLC (Member FINRA/SIPC). Managed Account Solutions are offered through E\*TRADE Capital Management, LLC, an investment adviser registered with the Securities and Exchange Commission. Bank products and services are offered by E\*TRADE Bank, a Federal savings bank, Member FDIC, or its subsidiaries and affiliates. More information is available at [www.etrade.com](http://www.etrade.com).

ETFC-G

### **About ResearchNow**

ResearchNow, a leading digital data collection provider, powers market research insights. They enable companies to listen to and interact with the world's consumers and business professionals through online panels, as well as mobile, digital and social media technologies. Their team operates in over 20 offices globally and is recognized as the market research industry's leader in client satisfaction. They foster a socially responsible culture by empowering their employees to give back. To find out more or begin a conversation, visit [www.researchnow.com](http://www.researchnow.com).

### **About the Survey**

This wave of the survey was conducted from January 8 to January 16 of 2015 among an online U.S. sample of 945 self-directed active investors who manage at least \$10,000 in an online brokerage account. The survey has a margin of error of  $\pm 3.2$  percent at the 95 percent confidence level. It was fielded and administered by ResearchNow. The panel is 65 percent male and 35 percent female with an even distribution across online brokerages, geographic regions and age bands.

# # #

### **Important Notices**

E\*TRADE Financial, E\*TRADE and the E\*TRADE logo are trademarks or registered trademarks of E\*TRADE Financial Corporation.

© 2015 E\*TRADE Financial Corporation. All rights reserved.

E\*TRADE Financial Corporation and ResearchNow are separate companies that are not affiliated. E\*TRADE Financial Corporation engages ResearchNow to program, field and tabulate the study.