

FINANCIAL PROS AND RETAIL INVESTORS

QUARTERLY REPORTS
Q1' 23 vs Q4'22

PROPRIETARY DATA



THE CLEANSE

Helping Financial Advisors take your
investments to the next level

ANALYSIS OF RETAIL INVESTORS' TICKER SEARCHES

Q1 2023 VS. Q4 2022

KEY TAKEAWAYS



- Companies at the forefront of **Artificial Intelligence** – Tesla, Nvidia, and Microsoft – were among retail investors' most viewed stocks as they become more aware of possible AI profits.



- The collapse of Silvergate Capital and SVB Financial scared investors with echoes of the Great Recession. Unsurprisingly, **volatile bank stocks like First Republic and PacWest Bancorp surged in total search volume** amid financial sector turmoil.



- Realizing the need to secure their investments, retail searches for **0-3-month Treasury bond ETFs exploded** as folks looked to gain exposure to higher interest rates.

MOST & LEAST RESEARCHED INDUSTRIES

- ↑ 322%** Engines & Turbines
- ↑ 80%** U.S. Regional Banks
- ↑ 36%** Prepackaged Software
- ↓ -94%** Investment Advice
- ↓ -97%** Staffing & Outsourcing
- ↓ -98%** Luxury Goods

QUARTER-OVER-QUARTER ANALYSIS



10 MOST VIEWED STOCKS

RANK	TICKER	COMPANY	CHANGE
1	TSLA	Tesla	↓
2	AAPL	Apple	↓
3	AMZN	Amazon	↓
4	ES	Eversource Energy	↓
5	NVDA	Nvidia	↓
6	MSFT	Microsoft	↓
7	NG	Natural Gas	↓
8	ALL	Allstate	↓
9	V	Visa	↓
10	GOOGL	Alphabet	↓



TOP 10 SURGING STOCKS

RANK	TICKER	COMPANY	CHANGE
1	FRC	First Republic Bank	919%
2	PACW	PacWest Bancorp	311%
3	SIVB	SVB Financial Group	285%
4	ALGM	Allegro MicroSystems	249%
5	WAL	Western Alliance Bancorporation	209%
6	WISA	WiSA Technologies	124%
7	IPDN	Professional Diversity Network	108%
8	WNS	WNS Limited	102%
9	EYPT	Eyepoint Pharmaceuticals	101%
10	VCYT	Veracyte	93%



10 MOST VIEWED ETFs

RANK	TICKER	COMPANY	CHANGE
1	SPY	SPDR S&P 500	↓
2	QQQ	Invesco QQQ	↓
3	TQQQ	ProShares UltraPro	↓
4	SQQQ	ProShares UltraPro Short	↓
5	JEPI	JPMorgan Equity Premium Income	↑
6	TLT	iShares 20+ Year Treasury	↓
7	BOIL	ProShares Ultra Bloomberg Natural Gas	↓
8	SOXL	Direxion Daily Semiconductor Bull 3X Shares	↓
9	GLD	SPDR Gold	↓
10	VOO	Vanguard 500	↓



TOP 10 SURGING ETFs

RANK	TICKER	COMPANY	CHANGE
1	ROM	ProShares Ultra Technology	128%
2	SGOV	iShares 0-3 Month Treasury Bond	114%
3	JEPI	JPMorgan Equity Premium Income	100%
4	PGF	Invesco Financial Preferred	93%
5	KRE	SPDR S&P Regional Banking	85%
6	IAT	iShares U.S. Regional Banks	84%
7	SCHD	Schwab U.S. Dividend Equity	76%
8	ARGT	Global X MSCI Argentina	74%
9	IXUS	iShares Core MSCI Total International	72%
10	VYMI	Vanguard International High Div Yield	66%



KEY TAKEAWAYS



• FinPros still need to show growth to their clients. With AI as the hottest theme with the most tangible story, **total search volume for AI companies increased** last quarter, some by more than double.



• Interest in long-term Treasury bond ETFs surged, as higher interest rates on safer debt attracted FinPros. Search volume for the iShares 20+ Year Treasury was up 222% from Q4.



• Since investing in individual AI companies and especially bonds can be difficult, interest in AI and bond ETFs jumped, with search volume for lesser-known ETFs in these categories soaring 2,000%.

MOST & LEAST RESEARCHED INDUSTRIES

- ↑ **515%** Regional Banks
- ↑ **470%** Recreational Vehicles
- ↑ **448%** Building Products & Equipment
- ↓ **-31%** Electrical Equipment & Parts
- ↓ **-44%** Uranium
- ↓ **-73%** Drug Manufacturers

QUARTER-OVER-QUARTER ANALYSIS



10 MOST VIEWED STOCKS

RANK	TICKER	COMPANY	CHANGE
1	TSLA	Tesla	↑
2	APPL	Apple	↑
3	ES	Eversource Energy	↑
4	AMZN	Amazon	↑
5	NVDA	Nvidia	↑
6	MSFT	Microsoft	↑
7	NG	Natural Gas	↑
8	ALL	Allstate	↑
9	SI	Silvergate Capital	↑
10	GE	General Electric	↑



TOP 10 SURGING STOCKS

RANK	TICKER	COMPANY	CHANGE
1	ALL	Allstate	1,539%
2	GE	General Electric	1,314%
3	SI	Silvergate Capital	1,096%
4	SCHW	Charles Schwab	1,067%
5	AI	C3.AI	1,014%
6	MSTR	MicroStrategy	646%
7	LLY	Eli Lilly and Company	476%
8	CAT	Caterpillar	474%
9	UNH	UnitedHealth Group	465%
10	WFC	Wells Fargo & Company	449%



10 MOST VIEWED ETFs

RANK	TICKER	COMPANY	CHANGE
1	SPY	SPDR S&P 500	↑
2	QQQ	Invesco QQQ	↓
3	TLT	iShares 20+ Year Treasury	↑
4	GLD	SPDR Gold Shares	↑
5	TQQQ	ProShares UltraPro	↑
6	DIA	SPDR Dow Jones Industrial Average	↑
7	IWM	iShares Russell 2000	↑
8	UNG	United States Natural Gas	↑
9	SQQQ	ProShares UltraPro Short	↓
10	XLE	Energy Select Sector SPDR	↑



TOP 10 SURGING ETFs

RANK	TICKER	COMPANY	CHANGE
1	SIL	Global X Silver Miners	3,433%
2	CPER	United States Copper	3,375%
3	SPXU	ProShares Ultra Short S&P 500	3,056%
4	SGOV	iShares 0-3 Month Treasury	3,000%
5	BOTZ	Global X Robotics & Artificial Intelligence	2,933%
6	BIL	SPDR Bloomberg 1-3 Month T-Bill	2,800%
7	NUGT	Direxion Daily Gold Miners Bull 2X	2,333%
8	STIP	iShares 0-5 Year TIPS Bond	2,200%
9	XSD	SPDR S&P Semiconductor	1,917%
10	PFF	iShares U.S. Preferred and Income	1,891%