



Direct Indexing Sets Canada In Its Sights

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Direct indexing is a focal point for digital wealth innovation in the United States. Canadian banks and other wealth managers need to embrace this disruptive investment strategy to provide a more personalized client experience and fend off incursions by U.S. competitors.

Companies Mentioned: Bank of Montreal (BMO), Canadian Imperial Bank of Commerce (CIBC), Charles Schwab, Facebook (only glancingly), Interactive Brokers, National Bank of Canada, Parametric Portfolio Associates, Power Corporation, Questrade, Royal Bank of Canada (RBC), Scotiabank, TD Bank, Wealthsimple

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