

INVESTING SURVEY
FOURTH QUARTER 2025

RESULTS & ANALYSIS

stock*perks*



INVESTING SURVEY RESULTS & ANALYSIS – FOURTH QUARTER 2025

KEY FINDINGS



Market Resilience

Nearly 80% of investors demonstrate buy the dip or hold mentality during downturns



Active Buyers

30% plan to buy more stocks in next 6 months, while only 3% are selling



Sector Focus

Energy (36%) and Technology (39%) lead as top sectors for next 6 months



Long-Term Investors

51% investing for retirement; 66% trade only a few times a year or rarely



Communication Demand

64% prefer regular email updates from companies; only 17% favor IR websites



Brand Loyalty

70% are likely to buy from brands they invest in

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INVESTOR OUTLOOK AND PORTFOLIO SHIFTS

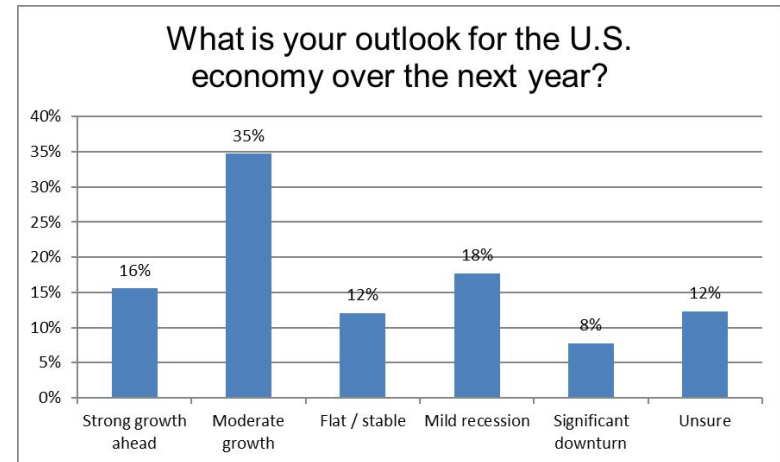
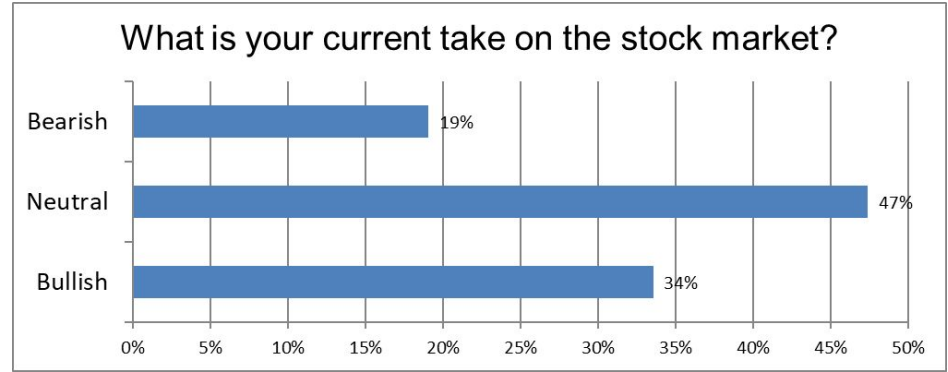
Stockperks recently conducted its quarterly survey of over 275,000 retail investors on the platform, offering insight into current investor sentiment and behavior. The results reveal a proactive, digitally-savvy, and resilient investor base that presents a significant opportunity for public companies that refine their investor relations strategies.

Economic and Market Sentiment

Retail investor outlook is characterized by positive caution. This majority neutral / bullish view is more positive than the broader view of the economy.

General and Economic Outlook

A small majority expect moderate or strong growth in the economy over the next 12-months. The ~26% of respondents who expect mild or significant recession is lower than the 34% who felt similarly in our Q3 survey.



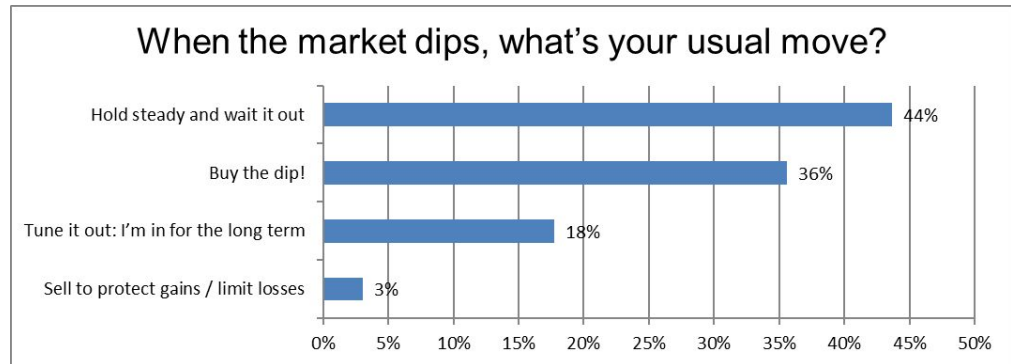
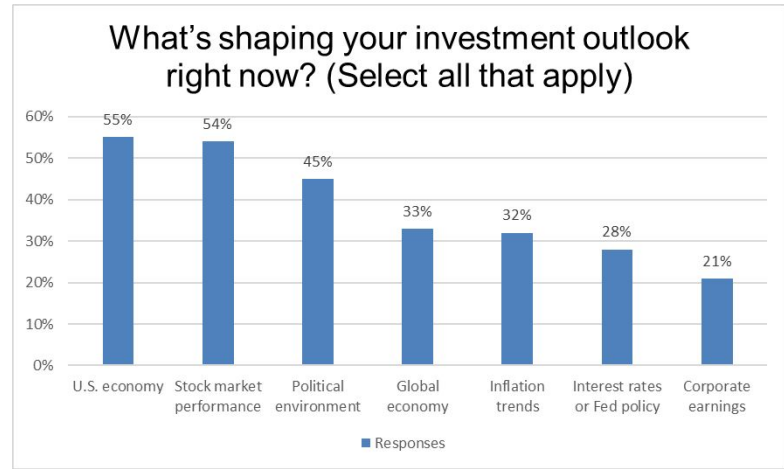
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RISK TOLERANCE & INVESTING FACTORS

Stock market performance and the political environment are the most significant factors shaping investors' current outlook. As the US midterm elections come into focus, the “political environment” has not surprisingly become more important to investors this quarter.

Investor Behavior

Our investors believe in the stock market and either hold steady through turbulence or buy the dips.



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PROFILE OF THE IDEAL RETAIL INVESTOR

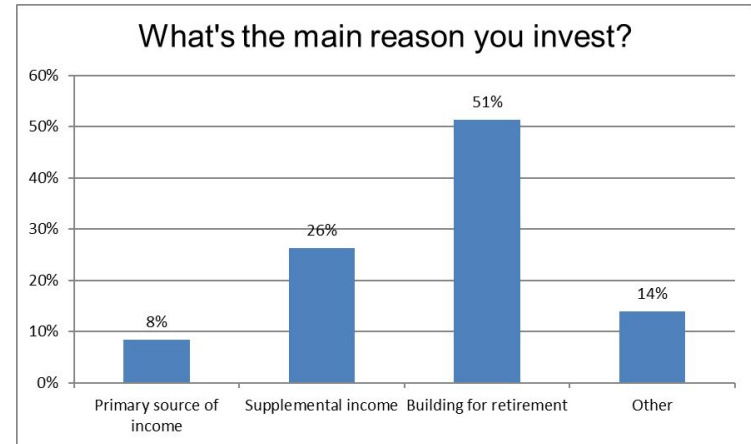
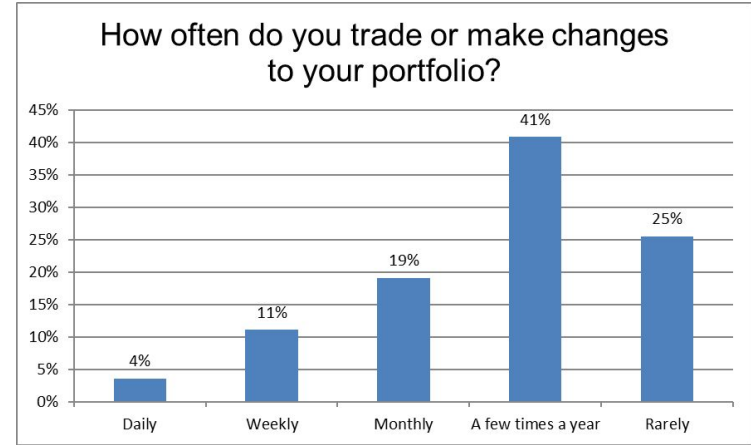
The data continues to reinforce a clear trend: retail investors on the Stockperks platform overwhelmingly exhibit the characteristics of long-term investors, exactly the type many public companies aim to attract.

Not Short-Term Traders

The majority are not frequent traders, making portfolio adjustments only a few times a year or less, emphasizing their long-term, growth-oriented mindset. Most investors trade or adjust their portfolio "A few times a year" (41%) or "Rarely" (25%), indicating infrequent trading behavior.

Goal-Oriented

The primary reason to invest for 51% is retirement purposes, followed by supplemental income (26%).



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PORTFOLIO PREFERENCES

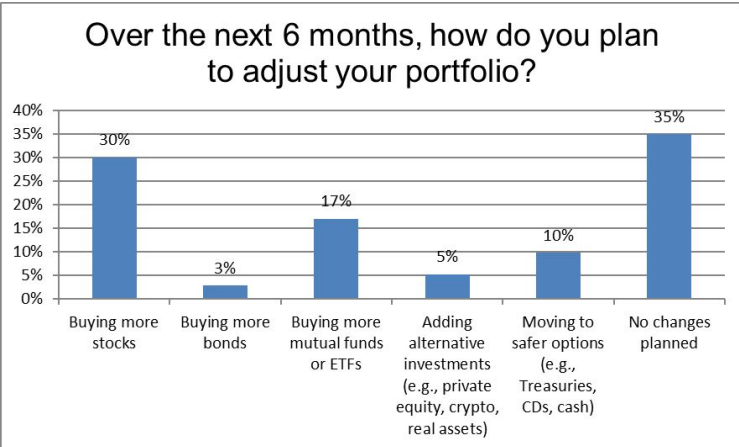
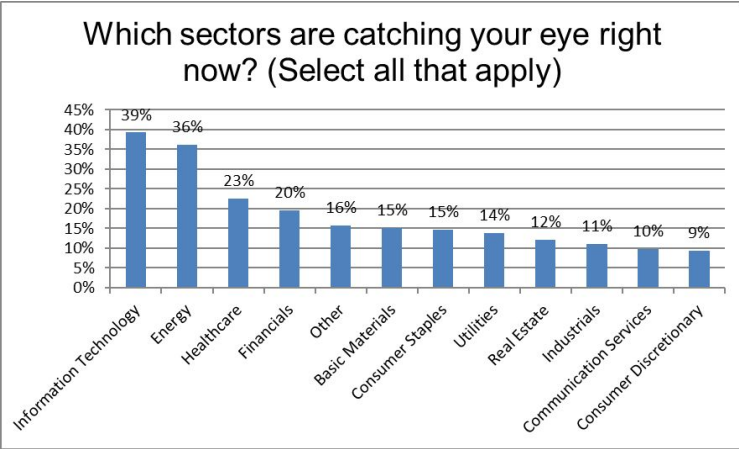
Top Sectors of Interest

For the next six months, investors continue to show the most interest in the Information Technology and Energy sectors, with almost 40% of respondents considering investments in each.

Portfolio Composition and Future Intentions

Stocks are the most widely held asset class, with >90% of respondents holding them.

>30% are looking to buy more stocks!!



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INVESTOR RESEARCH AND COMMUNICATION PREFERENCES

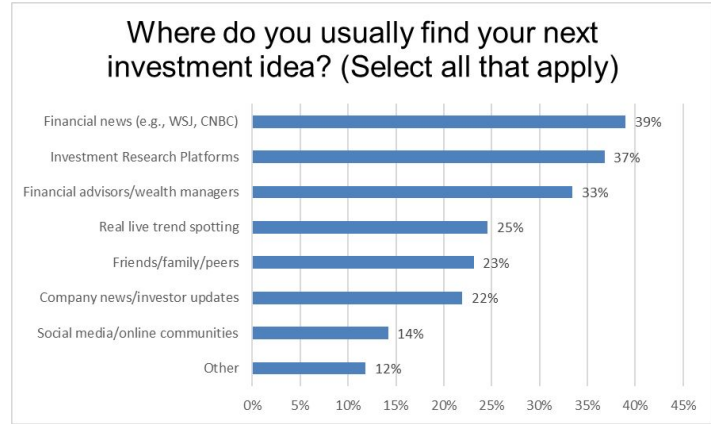
Channels for Discovering Investment Opportunities

Retail investors use a multi-channel approach to discover new opportunities. Professional financial resources (news sources, research analysts and websites + their financial advisors) are the primary idea sources.

Preferred Communication Channels

The preference for communication from the companies they invest in is overwhelmingly via direct regular email updates.

>64% of retail investors want regular email updates from companies!!



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ACCESS TO MANAGEMENT & COMPANY LOYALTY

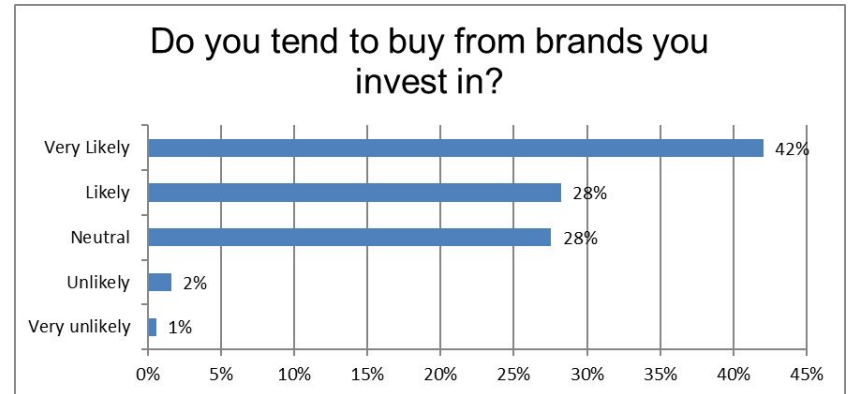
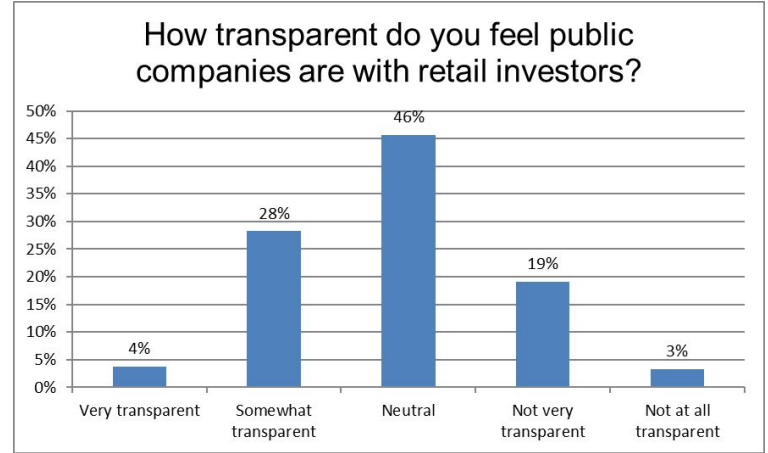
Perceptions of Corporate Transparency and Access

There is significant room for improvement in how public companies are perceived. A large plurality of investors (46%) feel neutral about corporate transparency, while a combined 22% feel companies are "not very" or "not at all" transparent.

Share Ownership and Purchase Behavior

As a preview to our more comprehensive Q1 2026 survey focusing on shareholders loyalty behaviors, 70+% of shareholders say they're "likely" or "very likely" to buy shares from companies they own shares in.

Owning shares in a company influences a shareholder's buying behavior...





Contact for More Information

For additional details, please contact Scott McCartney at scott@stockperks.com, or visit www.stockperks.com

We can also conduct custom surveys of our 275,000+ global users.

Let's talk!

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