

LPL Investment Holdings Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

<https://marketpublishers.com/r/L9C733E985FBEN.html>

Date: May 2025

Pages: 50

Price: US\$ 499.00 (Single User License)

ID: L9C733E985FBEN

Abstracts

LPL Investment Holdings Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between LPL Investment Holdings Inc. and its competitors. This provides our Clients with a clear understanding of LPL Investment Holdings Inc. position in the Industry.

The report contains detailed information about LPL Investment Holdings Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for LPL Investment Holdings Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The LPL Investment Holdings Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and

company's long-term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes LPL Investment Holdings Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of LPL Investment Holdings Inc. business.

About LPL Investment Holdings Inc.

LPL Investment Holdings Inc. provides technology, brokerage and investment advisory services through business relationships with independent financial advisors, financial advisors employed by financial institutions, registered investment advisors (RIAs), and financial institutions.

Through its proprietary technology, custody and clearing platforms, the company offers its customers access to an array of financial products and services that enable them to provide financial advice and brokerage services to retail investors (their 'clients').

The company partners with approximately 4,800 businesses consisting of independent advisor practices, banks, credit unions and insurance companies. Through these relationships, the company supports approximately 16,000 financial professionals of which approximately 12,000 are licensed with its broker-dealer subsidiaries, and 3.9 million client accounts, as of December 31, 2009.

Clearing and Compliance Services

The company custody and clear the majority of its customers' transactions. It can address all facets of securities transaction processing, including order routing, trading

support, execution and clearing, and position keeping; regulatory and tax compliance and reporting; and investment accounting and recordkeeping.

Practice Management Programs and Training

The following represents a sample of the practice management and training services the company offer: business consulting support that helps financial advisors, banks, and credit unions enhance the value and operational efficiency of their business; advisory and brokerage consulting to support customers in growing their business with its product and fee-based offering, as well as wealth management services to assist financial advisors serving high-net-worth clients with comprehensive estate, tax, philanthropic, and financial planning processes; marketing campaigns and consultation to enable financial advisors to build awareness of their services and capitalize on opportunities in their local markets; and transition services to help financial advisors establish independent practices and migrate client accounts to its firm.

Independent Research

The company's research team delivers timely perspectives on the economic marketplace and products, enabling financial advisors to help their clients understand and adjust to the latest developments. In addition, research provides recommendations on mutual funds, separately managed accounts, and investment products, complemented by an array of asset allocation models and portfolio construction capabilities, to assist advisors.

Product Access

The company provides open-architecture access to a variety of commission, fee-based, and money-market products and services. This distribution includes access to approximately 7,500 investment products, including mutual funds, annuities and insurance, offered through 400 product sponsors. The sales and administration of these products are facilitated through BranchNet and the Resource Center, which allow financial advisors to access client accounts, product information, asset allocation models, investment recommendations, and economic insight as well as perform trade execution.

Commission-Based Products

The company's brokerage offerings include variable and fixed annuities, mutual funds,

general securities, alternative investments, retirement and 529 education savings plans, fixed income, and insurance. The company's insurance offering is provided through LPL Insurance Associates, Inc. (LPLIA), a brokerage general agency which provides personalized advance case design, point-of-sale service and product support for a range of life, disability and long-term care products.

Fee-Based Advisory Platforms and Support

The company has five fee-based advisory platforms that provide centrally managed or customized solutions financial advisors can choose from to meet the investment needs of their mass affluent and high net worth clients. The company's fee-based platforms provide access to no-load/load-waived mutual funds, exchange-traded funds, stocks, bonds, conservative option strategies, unit investment trusts and no-load, institutional money managers, and multi-manager variable annuities. The company's research department provides model portfolio allocations, mutual fund and fixed income recommendations and access to third-party equity research.

Cash Sweep Programs

The company assists its customers in managing their clients' cash balances through two primary cash sweep programs depending on account type: money market sweep vehicles involving multiple money market fund providers and an insured bank deposit sweep vehicle. The company's insured bank deposit sweep vehicle allocates client cash balances across multiple non-affiliated banks to provide customers with insurance through the Federal Deposit Insurance Corporation (FDIC).

History

LPL Investment Holdings Inc. was founded in 1968.

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

Contents

RESEARCH METHODOLOGY

DISCLAIMER

1. LPL INVESTMENT HOLDINGS INC. COMPANY PROFILE

- 1.1. Key facts
- 1.2. Financial Performance
- 1.3. Key Executives
- 1.4. Ownership and Major Holders
- 1.5. Company History

2. LPL INVESTMENT HOLDINGS INC. BUSINESS OVERVIEW

- 2.1. Business Description
- 2.2. Major Products and Services
- 2.3. Markets and Sales Activities
- 2.4. Locations, Subsidiaries, Operating Units

3. LPL INVESTMENT HOLDINGS INC. SWOT ANALYSIS

- 3.1. Overview
- 3.2. Strengths
- 3.3. Weaknesses
- 3.4. Opportunities
- 3.5. Threats

4. LPL INVESTMENT HOLDINGS INC. FINANCIAL ANALYSIS

- 4.1. Financial Statements
 - 4.1.1. Income Statement
 - 4.1.2. Balance Sheet
 - 4.1.3. Cash Flow
- 4.2. Financial Ratios
 - 4.2.1. Profitability
 - 4.2.2. Margin Analysis

- 4.2.3. Asset Turnover
- 4.2.4. Credit Ratios
- 4.2.5. Long-Term Solvency
- 4.2.6. Growth Over Prior Year
- 4.2.7. Financial Ratios Charts
- 4.3. Stock Market Snapshot

5. LPL INVESTMENT HOLDINGS INC. COMPETITORS AND INDUSTRY ANALYSIS

- 5.1. LPL Investment Holdings Inc. Direct Competitors
- 5.2. Comparison of LPL Investment Holdings Inc. and Direct Competitors Financial Ratios
- 5.3. Comparison of LPL Investment Holdings Inc. and Direct Competitors Stock Charts
- 5.4. LPL Investment Holdings Inc. Industry Analysis
 - 5.4.1. Industry Snapshot
 - 5.4.2. LPL Investment Holdings Inc. Industry Position Analysis

6. LPL INVESTMENT HOLDINGS INC. NEWS & EVENTS

- 6.1. News & PR Activity Analysis
- 6.2. IR Corporate News
- 6.3. Marketing News
- 6.4. Corporate Events

7. LPL INVESTMENT HOLDINGS INC. EXPERTS REVIEW¹

- 7.1. Experts Consensus
- 7.2. Experts Revisions

8. LPL INVESTMENT HOLDINGS INC. ENHANCED SWOT ANALYSIS²

9. UNITED STATES PESTEL ANALYSIS²

- 9.1. Political Factors
- 9.2. Economic Factors
- 9.3. Social Factors
- 9.4. Technological Factors
- 9.5. Environmental Factors
- 9.6. Legal Factors

10. LPL INVESTMENT HOLDINGS INC. IFE, EFE, IE MATRICES²

- 10.1. Internal Factor Evaluation Matrix
- 10.2. External Factor Evaluation Matrix
- 10.3. Internal External Matrix

11. LPL INVESTMENT HOLDINGS INC. PORTER FIVE FORCES ANALYSIS²

12. LPL INVESTMENT HOLDINGS INC. VRIO ANALYSIS²

APPENDIX: RATIO DEFINITIONS

LIST OF FIGURES

LPL Investment Holdings Inc. Annual Revenues in Comparison with Cost of Goods Sold and Gross Profit
Profit Margin Chart
Operating Margin Chart
Return on Equity (ROE) Chart
Return on Assets (ROA) Chart
Debt to Equity Chart
Current Ratio Chart
LPL Investment Holdings Inc. 1-year Stock Charts
LPL Investment Holdings Inc. 5-year Stock Charts
LPL Investment Holdings Inc. vs. Main Indexes 1-year Stock Chart
LPL Investment Holdings Inc. vs. Direct Competitors 1-year Stock Charts
LPL Investment Holdings Inc. Article Density Chart

1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
The complete financial data is available for publicly traded companies.

List Of Tables

LIST OF TABLES

LPL Investment Holdings Inc. Key Facts
Profitability
Management Effectiveness
Income Statement Key Figures
Balance Sheet Key Figures
Cash Flow Statement Key Figures
Financial Performance Abbreviation Guide
LPL Investment Holdings Inc. Key Executives
LPL Investment Holdings Inc. Major Shareholders
LPL Investment Holdings Inc. History
LPL Investment Holdings Inc. Products
Revenues by Segment
Revenues by Region
LPL Investment Holdings Inc. Offices and Representations
LPL Investment Holdings Inc. SWOT Analysis
Yearly Income Statement Including Trends
Income Statement Latest 4 Quarters Including Trends
Yearly Balance Sheet Including Trends
Balance Sheet Latest 4 Quarters Including Trends
Yearly Cash Flow Including Trends
Cash Flow Latest 4 Quarters Including Trends
LPL Investment Holdings Inc. Profitability Ratios
Margin Analysis Ratios
Asset Turnover Ratios
Credit Ratios
Long-Term Solvency Ratios
Financial Ratios Growth Over Prior Year
LPL Investment Holdings Inc. Capital Market Snapshot
LPL Investment Holdings Inc. Direct Competitors Key Facts
Direct Competitors Profitability Ratios
Direct Competitors Margin Analysis Ratios
Direct Competitors Asset Turnover Ratios
Direct Competitors Credit Ratios
Direct Competitors Long-Term Solvency Ratios
Industry Statistics

LPL Investment Holdings Inc. Industry Position
Company vs. Industry Income Statement Analysis
Company vs. Industry Balance Sheet Analysis
Company vs. Industry Cash Flow Analysis
Company vs. Industry Ratios Comparison
LPL Investment Holdings Inc. Consensus Recommendations¹
Analyst Recommendation Summary¹
Price Target Summary¹
Experts Recommendation Trends¹
Revenue Estimates Analysis¹
Earnings Estimates Analysis¹
Historical Surprises¹
Revenue Estimates Trend¹
Earnings Estimates Trend¹
Revenue Revisions¹

ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

I would like to order

Product name: LPL Investment Holdings Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

Product link: <https://marketpublishers.com/r/L9C733E985FBEN.html>

Price: US\$ 499.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/L9C733E985FBEN.html>