

Wealth Management Competitor Tracker, December 2009

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Abstracts

Introduction

This monthly tracker covers product innovation, customer targeting, M&A, partnerships, organic growth, and staffing activity globally in the wealth management space.

Reasons to Purchase

Track the strategies announced by 50+ of your key competitors.

Assess which geographies and strategic areas are seeing the most activity.

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Introduction

The Wealth Management Competitor Tracker provides both one month and 12 month views of developments

Each month, Datamonitor tracks the most relevant announcements from 55 competitors. Datamonitor's Wealth Management Team provides analysis of the key developments at both the one month and 12 month level

A fully searchable database of the past 12 months of developments is also delivered alongside the report

Key Trends and Developments in December

There were some notable developments within the wealth management industry during December

ANZ acquires ING wealth management in Australia and New Zealand, and RBS in Taiwan, Singapore, Indonesia and Hong Kong

Barclays Wealth makes several key appointments

In December, wealth management strategic initiatives picked up

There were a total of 25 competitor developments in December

M&A and staffing activity were both high in the wealth market in December

Competitor activity was balanced across Europe, Asia and the US

Product Innovation and Customer Targeting

Bank of New York Mellon

BNY Mellon provides analytics to clients through Portsmouth Financial Systems

DBS

DBS China launches gold fund linked structured investment products

Morgan Stanley

Morgan Stanley Investment Management introduces a program for minority and woman-owned asset managers

Northern Trust

Northern Trust to offer environmental analytics for clients

M&A, Partnerships and Organic Growth

ABN Amro

ABN Amro and Deutsche Bank sign share purchase agreement

ANZ

ANZ acquires ING wealth management in Australia and New Zealand

ANZ completes acquisition of RBS in 6 Asian markets, and opens its tenth branch in Vietnam

Banco Popolare

Banco Popolare signed agreement for the sale of Banco Popular Ceska Republika

BBVA

BBVA increases its stake in China Citic Bank to 15%

Citi

Citi opens branch in Chongqing China

Hang Seng

Hang Seng Bank expands its network by opening its branch in Guangzhou

Intesa Sanpaolo

Banca Monte dei Paschi di Siena sells 50 branches to the Intesa Sanpaolo Group

KBC

KBC Bank acquires outstanding 49.54% stake in ?SOB Slovakia to take complete ownership

Staffing

Barclays

Barclays Wealth appoints Duncan Gourlay as a private banker

Barclays Wealth appoints Roland Kitson as a new director in Wealth Intermediaries

Barclays Wealth Intermediaries appoints a new relationship manager

Barclays Wealth appoints Richard Comeau as investment representative

Bessemer Trust

Bessemer Trust announces the appointment of managing director and senior resident officer

BNY Mellon

BNY Mellon appoints Frank Froud and Hani Kablawi as heads of client management for US and Europe

Deutsche Bank

Deutsche Bank Private Wealth Management appoints managing director and head of global investment solutions

Julius Baer

Julius Baer announces the appointment of new CEO Dubai

Northern Trust

Northern Trust appoints David Blowers to head wealth management across Midwest

Sal. Oppenheim

Sal. Oppenheim announces new appointments as focus shifts to private banking

Standard Chartered

Standard Chartered appoints group head of wealth management

Standard Chartered private bank hires Diego Y. Polenghi as head of sales

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Datamonitor consulting

Disclaimer

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