

Wealth Management Competitor Tracker, March 2010

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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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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 March

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

ANZ received approvals for its acquisition of certain RBS businesses

Deutsche Bank acquires Sal. Oppenheim Group

Sarasin opens a branch in Hong Kong

In March, there was a sudden decline in the number of strategic developments in the wealth management industry

There were a total of 16 competitor developments in March

M&A and staffing were the predominant activities in the wealth market in March

Competitor activity was strong in Europe

Product Innovation and Customer Targeting

Bank of America

Bank of America launches a new campaign

Citigroup

Citibank launches new financial education book series

Investec

Investec introduces a music and entertainment banking team

Mellon Financial Corp

BNY Mellon Asset Management introduces a new fund

Sarasin

Sarasin launches a sustainable equity fund

Standard Chartered

Standard Chartered introduces a new website for female entrepreneurs
M&A, Partnerships and Organic Growth
ABN Amro
ABN Amro announces merger with Fortis Bank Nederland

ANZ

ANZ announces opening of India branch
ANZ receives approvals for RBS business acquisitions
Deutsche Bank
Deutsche Bank acquires Sal. Oppenheim Group

HSBC

HSBC opens a branch in Los Angeles
Julius Baer
Julius Baer acquires parts of ING Bank
Sarasin
Sarasin opens a branch in Hong Kong
Staffing
Barclays
Barclays Wealth strengthens MENA banking team
Credit Suisse
Credit Suisse announces the appointment of Federico Imbert as CEO
Soci?t? G?n?rale
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