

Wealth Management Competitor Tracker: September 2010

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Abstracts

Introduction

The Wealth Management Competitor Tracker provides expert analysis and opinion on the strategic moves of leading competitors in the wealth management space. Produced on a monthly basis, the Tracker is a global product and covers over 50 players and their associated brands, including ANZ, Citigroup, HSBC, Standard Chartered, UBS and Westpac

Features and benefits

Gain invaluable information on your key competitors in one concise document, and track long-term trends using the interactive news database

Sharpen your strategy by implementing the best market, product, competitor and strategic developments of leading global players

Learn the Datamonitor Wealth & Investments Team's view on the most important competitor developments in the month

Highlights

Activity picked up in September with a total of 18 developments, compared to August's low of 13. Nonetheless, this is still down on the 12-month average of 23

Staffing changes accounted for the majority of activity in September, with a total of 11 developments, including some senior appointments

Your key questions answered

Which regions have experienced the most competitor activity?

What have been the key product developments and innovations amongst my competitors?

Which competitors have experienced the most staffing changes over the last year?

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Catalyst
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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 & Investments 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 provided alongside the report.

KEY TRENDS AND DEVELOPMENTS IN SEPTEMBER

There were some notable developments within the wealth management industry during September.

Bank Sarasin expands its service offerings for high net worth private clients.

Julius Baer further expands its footprint in Asia.

In September, activity in the wealth management market started to pick up from August's quiet period.

There was a total of 18 developments in September.

Staffing changes accounted for the majority of developments in September.

North America and Western Europe accounted for most of the activity in September.

PRODUCT INNOVATION AND CUSTOMER TARGETING

Sarasin

Bank Sarasin expands its service offerings for high net worth private clients.

M&A, PARTNERSHIPS AND ORGANIC GROWTH

BNY Mellon

BNY Mellon acquires I3 Wealth Advisors of Toronto.

Citigroup
Citi receives approval to establish Nanjing branch
Commerzbank
Commerzbank sells Dresdner Bank Monaco
Crédit Agricole
Crédit Agricole to acquire Axeria Vie and April Patrimoine
Julius Baer
Julius Baer further expands its footprint in Asia
Société Générale
Société Générale opens new office in Edinburgh

STAFFING

Bank of America
Bank of America appoints new head for Latin American business
Barclays
Barclays appoints Robert E. Diamond as group chief executive
Bessemer Trust
Bessemer Trust appoints new heads for its offices
BNP Paribas
BNP Paribas strengthens wealth management team

HSBC

HSBC appoints Maha Quol to head Vienna, US, branch
HSBC targets Long Island business for future growth
Morgan Stanley
Morgan Stanley appoints James F. Walker as head of consulting services
Morgan Stanley names Sean Chao as chief executive officer of Taiwan

RBC

RBC appoints new deputy chairman and restructures its geographic business
Union Bancaire Privée
Union Bancaire Privée appoints new chief executive officer in Asia

UBS

UBS appoints head of Switzerland wealth management business

APPENDIX

Methodology

Further reading

Ask the analyst

Datamonitor consulting

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