

Global Balanced Funds Market Size study, By Investor Type (Institutional and Individual) and By Distribution Channel (Banks, Financial Advisors/Brokers, Direct Sellers), and Regional Forecasts 2022-2028

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Abstracts

Global Balanced Funds Market is valued approximately USD XX million in 2021 and is anticipated to grow with a healthy growth rate of more than XX % over the forecast period 2022-2028.

The Balanced Funds can be defined as hybrid mutual funds that mainly invest money across different asset class, such as a mix of low- to medium-risk stocks and bonds. In addition, Balanced funds invest with the goal of both income and capital appreciation. The growing expansion of mutual funds market and increasing number of first-time investors as well as recent Strategic initiatives from leading market players are factors that are accelerating the global market demand. For instance, according to Statista – as of 2019, the Total net assets of US-registered mutual funds worldwide were estimated at USD 21.28 Trillion, and this amount is further increased to USD 26.96 Trillion in 2021. Furthermore, leading market players are coming up with new investment funds to capitalize the growing adoption of Balanced Funds. For instance, in August 2021, SBI Mutual Fund launched its SBI Balanced Advantage Fund. This is an open-ended dynamic asset allocation fund and would track CRISIL Hybrid 50+50 – Moderate Index TRI. Moreover, in July 2022, Mirae Asset Mutual Fund launched the Mirae Asset Balanced Advantage Fund. It is an open-ended dynamic asset allocation fund, and its benchmark index would be Nifty 50 Hybrid Composite Debt 50:50 Index. Also, growing awareness towards investing in emerging economies coupled with increasing number of favorable initiatives from leading market players are anticipated to act as a catalyzing factor for the market demand during the forecast period. However, rising concern over inconsistent returns impedes the growth of the market over the forecast period of

2022-2028.

The key regions considered for the global Balanced Funds Mmarket study include Asia Pacific, North America, Europe, Latin America, and the Rest of the World North America is the leading region across the world in terms of market share owing to the growing number of institutional investors and presence of leading Balanced Fund providers in the region. Whereas, Asia Pacific is anticipated to exhibit a significant growth rate over the forecast period 2022-2028. Factors such as the thriving growth of mutual funds industry and increasing number of first-time investors, would create lucrative growth prospects for the global Balanced Funds Mmarket across the Asia Pacific region.

Major market players included in this report are:

Axis Mutual Fund
Canada Life Assurance Company
Citigroup Inc.
Charles Schwab
Goldman Sachs
JPMorgan Chase & Co.
Nippon Life India Asset Management Limited
Scotiabank
Tata Mutual Fund
The Vanguard Group Inc.

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming eight years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within each of the regions and countries involved in the study. Furthermore, the report also caters the detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, the report shall also incorporate available opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Investor Type

Institutional

Individual

By Distribution Channel

Banks

Financial Advisors/Brokers

Direct Sellers

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Rest of the World

Furthermore, years considered for the study are as follows:

Historical year – 2018, 2019, 2020

Base year – 2021

Forecast period – 2022 to 2028

Target Audience of the Global Balanced Funds Market in Market Study:

Key Consulting Companies & Advisors

Large, medium-sized, and small enterprises

Venture capitalists

Value-Added Resellers (VARs)

Third-party knowledge providers

Investment bankers

Investors

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