

Wealth Management Platform Market by Advisory Model (Human Advisory, Robo Advisory, and Hybrid), Business Function (Reporting, Portfolio, Accounting, and Trading Management), Deployment Model, End-User Industry, and Region - Global Forecast to 2022

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Abstracts

Constant rise in the number of global High Net Worth Individuals (HNWIs) and compliance with stringent industry regulations are expected to drive the wealth management platform market

The global wealth management platform market size is expected to grow from USD 1.70 billion in 2017 to USD 3.20 billion by 2022, at a Compound Annual Growth Rate (CAGR) of 13.4% during the forecast period. The constant rise in the number of global HNWIs, compliance with stringent industry regulations and digitalization, and process automation are expected to be the major factors in fueling the growth of the wealth management platform market. However, a higher dependency on the traditional methods is expected to act as a major restraining factor for the growth of the market.

Financial advice management business function is expected to hold the largest market size during the forecast period

Among the business functions, the financial advice management segment is the majorly adopted, as it serves clients with the best financial advice. HNWIs are always in need of securely and properly managing their wealth and financial assets, and hence, they approach the financial advisors. Further, with the advent of the robo advisory and hybrid advisory models, customers have frequently managed to use wealth management platform services, thereby boosting the growth of the financial advice platforms. Investment management firms generally offer passive investments as opposed to that of

active management, which is provided by a human adviser.

Asia Pacific (APAC) is projected to grow at the highest rate during the forecast period

The wealth management platform market growth in the APAC region has gained momentum and expected to record the highest rate in the coming years. Japan, Australia, New Zealand, China, and India are using wealth management platforms across end-user industries. The rapid growth of the wealth management platform market in the APAC region can be attributed to the massive growth in the business deals, such as mergers and acquisitions, across the APAC region. Moreover, the rapid expansion of domestic enterprises as well as the higher development of infrastructure are expected to drive the growth of the wealth management platform market in APAC.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews were conducted with key people. The break-up of the profiles of the primary participants is given below:

By Company: Tier 1: 55%, Tier 2: 20%, and Tier 3: 25%

By Designation: C-level: 60%, Director level: 25%, and Others: 15%

By Region: North America: 10%, Europe: 20%, RoW: 30%, and APAC: 40%

The following key vendors are profiled in the report:

SS&C (US)

Fiserv (US)

FIS (US)

Profile Software (UK)

Broadridge (US)

InvestEdge (US)

Temenos (Switzerland)

Finantix (Italy)

SEI Investments Company (US)

Comarch (Poland)

Objectway (Italy)

Dorsum (Hungary)

Research Coverage

The report has segmented the wealth management platform market based on advisory models, which are further segmented into 3 segments, namely, human advisory, robo advisory, and hybrid. It has then been segmented by business function, which is further fragmented into financial advice management, portfolio, accounting and trading management, performance management, risk and compliance management, reporting, and others (billing and benchmarking). Based on deployment models, the market has been segmented into on-premises and cloud. Further, according to end-user industries, the market has been segmented into banks, investment management firms, trading and exchange firms, brokerage firms, and others (asset management firms, and custody and compliance providers). The market by region has been segmented into North America, Europe, APAC, Latin America, and Middle East and Africa (MEA). Moreover, the regions have further been segmented into various countries. North America comprises the US and Canada; Europe has been fragmented into the UK, Germany, Italy, and the rest of Europe. On the other hand, APAC has been segmented into China, Japan, India, and the rest of APAC; and MEA has been divided into Middle East and Africa. Similarly, Latin America has been divided into Brazil, Mexico, and the rest of Latin America.

Reasons to Buy the Report

The report would help the market leaders/new entrants in this market in the following ways:

1. This report segments the wealth management platform market comprehensively and

provides the closest approximations of the revenue numbers for the overall market and subsegments across different industry verticals and regions.

2. The report helps stakeholders understand the pulse of the market and provides them with information on the key market drivers, restraints, challenges, and opportunities.

3. This report would help stakeholders better understand the competitors and gain more insights to enhance their position in the business. The competitive landscape section includes new product launches/developments; partnerships and collaborations; mergers and acquisitions; and expansions.

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