

# **Custody Service Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Equity, Fixed Income, Alternative Assets, Others), By Service (Core Custody Services, Ancillary Services, Core Depository Services, Others), By Region, By Competition 2019-2029**

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## **Abstracts**

Global Custody Service Market was valued at USD 35.6 Billion in 2023 and is anticipated to grow during the forecast period with a CAGR of 9.4% through 2029. The market for custody services is made up of the money that companies get paid to settle, store, and report on the cash and marketable securities that their clients own. Lending securities to qualified borrowers on a short-term basis might enable a client to earn additional revenue on custody assets. The value of associated goods that the service provider sells or incorporates into the service offering is included in the market value. Only products and services that are sold to final customers or exchanged between businesses are covered.

Marketable securities and customer cash are usually settled, kept safe, and reported as part of a custody service. An extra revenue stream on custodial assets can be obtained by a client through short-term securities loans to qualified borrowers. The main services of custody services are core custody services, ancillary services, core depository services, and other administrative services. Core custody service providers settle trades, invest cash balances as requested, collect income, execute corporate activities, price securities positions, and assist with record keeping and reporting. The services are available as equity, fixed income, alternative assets, and other types.

Automation and standardization are key factors driving the growth of the custody

services market. The custody services industry is focusing on using technology to improve efficiency. Core custody services and operations are automated and standardised, which improves quality of service and enables the custodian to respond promptly to future needs. Higher visibility, increased productivity as a result of operational efficiency, and lower customer costs are the outcomes. The asset-centric model is anticipated to be supplemented by a more data-centric, open platform approach where the custodian will have access to a range of available services in the upcoming years due to the automation and standardisation of custody services. An automated reporting system, for example, offers daily reports on exceptions, securities that are loanable, securities that are lent, cash collateral valuation, daily mark-to-market data, and margin calls. Thus, it is anticipated that the market for custody services will expand due to these automation and standardisation aspects.

## Key Market Drivers

### Rise in Global Wealth and Asset Accumulation

One of the primary drivers fueling the custody service market is the continuous increase in global wealth and asset accumulation. As economies expand and financial markets evolve, individuals and institutional investors accumulate a greater volume of financial assets. High-net-worth individuals, family offices, and institutional investors seek reliable and secure custody services to safeguard and manage their diverse portfolios. The growing affluence of emerging markets and the expansion of the global middle class contribute significantly to the increased demand for custody services.

The proliferation of diverse asset classes, including traditional securities, alternative investments, and digital assets, further amplifies the need for sophisticated custody solutions. Custodians play a pivotal role in facilitating the safekeeping and administration of these assets, ensuring compliance with regulatory requirements and providing clients with peace of mind.

### Regulatory Compliance and Risk Management

Regulatory requirements and risk management considerations are paramount in the financial industry, especially following the global financial crisis of 2008. Custody service providers are crucial intermediaries in helping clients adhere to complex regulatory frameworks governing the safekeeping and management of financial assets. Stricter regulations, such as Basel III and the Dodd-Frank Act, emphasize the need for robust risk management practices and increased transparency in financial transactions.

Custodians are expected to implement advanced risk management systems, compliance monitoring tools, and reporting mechanisms to ensure adherence to regulatory standards. The ability of custody service providers to navigate and adapt to evolving regulatory landscapes becomes a significant driver in the market. Clients seek custodians with a proven track record of regulatory compliance and a commitment to staying abreast of emerging regulatory changes.

### Globalization and Cross-Border Investing

The globalization of financial markets and the trend of cross-border investing contribute to the growth of the custody service market. Investors increasingly diversify their portfolios across geographies, seeking opportunities in different regions and asset classes. This trend necessitates custody services that can seamlessly operate across borders, managing the complexities associated with diverse regulatory environments, currencies, and settlement systems.

Custodians with a global presence and a well-established network of correspondent banks and sub-custodians become essential partners for investors engaged in cross-border transactions. The ability to provide efficient settlement services, foreign exchange capabilities, and local market expertise positions custody service providers as key facilitators of international investment strategies.

### Technological Advancements and Digital Assets

The custody service market is witnessing a transformation driven by technological advancements and the rise of digital assets. Traditional custodians are adapting to the digitization of financial markets and the increasing prominence of blockchain technology. The emergence of digital assets such as cryptocurrencies and tokenized securities presents new challenges and opportunities for custody service providers.

Custodians are investing in blockchain-based solutions, secure digital wallets, and advanced cybersecurity measures to address the unique requirements of digital asset custody. The ability to offer a secure and technologically advanced infrastructure for the custody of digital assets positions custodians at the forefront of innovation in the financial industry. As the adoption of digital assets continues to grow, custody services tailored to these assets become a crucial driver of market demand.

### Increasing Complexity of Investment Portfolios

The increasing complexity of investment portfolios is a significant driver propelling the growth of the custody service market. As financial markets become more sophisticated, investors, especially institutional ones, are diversifying their portfolios across a wide array of asset classes, including equities, fixed income securities, derivatives, private equity, and hedge funds. This diversification is driven by the quest for higher returns and risk mitigation through a well-balanced and varied investment strategy.

The diverse nature of these investment instruments often requires specialized knowledge and infrastructure for safekeeping, administration, and valuation. Custodians, with their expertise in handling various asset classes and intricate financial instruments, play a pivotal role in simplifying the complexities associated with managing diverse investment portfolios. They provide the necessary infrastructure and technology to support the custody, settlement, and reporting requirements for a broad spectrum of financial assets.

Moreover, the trend towards environmental, social, and governance (ESG) investing adds another layer of complexity to investment portfolios. Investors increasingly consider ESG factors in their decision-making processes, necessitating custodians to incorporate ESG considerations into their services. Custodians that can adapt to the evolving landscape of responsible investing and integrate ESG factors into their custody services are better positioned to meet the demands of clients seeking socially responsible and sustainable investment solutions.

## Key Market Challenges

### Rapid Technological Advancements and Cybersecurity Risks

One of the foremost challenges facing the custody service market is the rapid pace of technological advancements. While technology brings efficiency and innovation, it also introduces new risks, particularly in the realm of cybersecurity. The increasing reliance on digital platforms, blockchain technology, and cloud-based solutions exposes custodians to potential vulnerabilities, including cyber-attacks, data breaches, and system failures.

The custody of financial assets requires robust digital infrastructure to ensure secure storage, transaction processing, and communication. Cybersecurity threats, ranging from ransomware attacks to phishing scams, pose a significant risk to the integrity and confidentiality of sensitive financial data. Custodians must continually invest in

advanced cybersecurity measures, encryption technologies, and employee training to mitigate these risks and safeguard client assets.

As custodians adopt distributed ledger technology and explore blockchain solutions for asset management, they also encounter challenges related to interoperability, standardization, and the integration of decentralized systems. Striking a balance between innovation and security is crucial for custody service providers to thrive in an era of rapid technological evolution.

### Complex Regulatory Landscape and Compliance Burden

The custody service market operates within a complex regulatory landscape that varies across jurisdictions. Regulatory requirements, designed to ensure transparency, investor protection, and systemic stability, are subject to frequent changes and updates. The evolving nature of regulations poses a considerable challenge for custody service providers as they must adapt their operations to comply with new and often intricate rules.

Meeting compliance standards involves significant investments in technology, legal expertise, and operational processes. The burden of regulatory compliance extends beyond national borders, particularly for custodians serving global clients engaged in cross-border transactions. Navigating diverse regulatory frameworks and ensuring adherence to anti-money laundering (AML) and know your customer (KYC) regulations require substantial resources and vigilance.

Additionally, regulatory changes can impact the cost structure of custody services, potentially leading to increased operational expenses. Custodians need to strike a delicate balance between complying with regulations, maintaining operational efficiency, and managing costs to remain competitive in the market.

### Shifts in Market Dynamics and Fee Compression

The custody service market is experiencing shifts in market dynamics driven by factors such as increased competition, fee compression, and changing client expectations. The rise of passive investing and the proliferation of low-cost exchange-traded funds (ETFs) have exerted pressure on custodial fees. Investors, particularly institutional ones, are becoming more cost-conscious and demanding enhanced services at competitive prices.

Fee compression not only impacts the revenue streams of custody service providers but also necessitates a focus on operational efficiency and cost containment. Custodians need to invest in technology to automate routine tasks, streamline processes, and improve overall efficiency. At the same time, they must enhance their service offerings to differentiate themselves in a crowded market.

The competitive landscape is evolving with the entry of non-traditional players, including fintech firms and global banks, offering custody-related services. Custodians face the challenge of adapting to this changing competitive environment, differentiating their value propositions, and meeting the evolving expectations of clients who seek not only cost-effective solutions but also advanced technology and personalized service.

### Emergence of Digital Assets and Regulatory Uncertainty

The increasing popularity of digital assets, including cryptocurrencies and tokenized securities, poses a unique set of challenges for custody service providers. The custody of digital assets requires specialized infrastructure, secure digital wallets, and adherence to evolving regulatory frameworks. Regulatory uncertainty surrounding the classification and treatment of digital assets adds complexity to custodial services in this emerging asset class.

Custodians must navigate the evolving regulatory landscape for digital assets, addressing issues related to custody, valuation, and compliance. The lack of standardized regulations globally adds an additional layer of complexity, as custodians may need to tailor their services to meet jurisdiction-specific requirements.

Moreover, the dynamic nature of the digital asset market requires custodians to stay at the forefront of technological developments, ensuring compatibility with blockchain-based solutions and adapting to changes in the digital ecosystem. The custody of digital assets also brings forth challenges related to private key management, custody of non-fungible tokens (NFTs), and the integration of decentralized finance (DeFi) protocols.

### Key Market Trends

#### Digital Transformation and Blockchain Integration: Revolutionizing Custody Services

In the ever-evolving landscape of financial services, digital transformation has emerged as a dominant trend shaping the custody service market. This transformation is driven by the integration of cutting-edge technologies, with blockchain at the forefront. As



financial markets become more complex and interconnected, custodians are harnessing the power of digital technologies to enhance security, efficiency, and transparency in the management of financial assets.

Blockchain, a decentralized and distributed ledger technology, is revolutionizing how custody services operate. It offers a secure and transparent way to record, verify, and transfer assets, reducing the risk of fraud and errors. Custodians are increasingly exploring blockchain-based solutions for various aspects of their operations, including settlement processes, record-keeping, and the custody of digital assets.

One key area where blockchain is making a significant impact is in the custody of digital or tokenized assets. Traditional custodians are adapting their infrastructure to support the custody of cryptocurrencies, security tokens, and other digital assets. Blockchain's immutability and cryptographic security features provide a robust foundation for ensuring the integrity and ownership of these assets.

Moreover, blockchain facilitates real-time settlement and reduces the reliance on intermediaries, resulting in quicker and more cost-effective transactions. This trend is particularly relevant as global financial markets move towards 24/7 trading and demand faster settlement cycles.

As custodians continue to invest in digital transformation initiatives, the integration of blockchain technology is not just a technological upgrade but a strategic shift towards more secure, efficient, and transparent custody services. The trend is reshaping the traditional custodial landscape, positioning forward-thinking providers at the forefront of innovation in the financial industry.

### ESG Integration: Aligning Custody Services with Sustainable Investing

The growing emphasis on environmental, social, and governance (ESG) factors in investment decision-making is a major trend shaping the custody service market. Institutional investors, asset managers, and high-net-worth individuals are increasingly prioritizing sustainable and responsible investing, prompting custodians to integrate ESG considerations into their services.

ESG integration in custody services goes beyond the mere safekeeping of assets. Custodians are now expected to provide comprehensive ESG reporting, allowing investors to assess the environmental and social impact of their portfolios. This involves tracking and reporting on key ESG metrics, such as carbon footprint, diversity and

inclusion efforts, and ethical governance practices.

Custodians are also adapting their risk management frameworks to account for ESG factors. Understanding the potential risks associated with climate change, social issues, and governance practices is becoming essential for effective portfolio management. Custodians that can provide ESG-related risk assessments and mitigation strategies are gaining a competitive edge in the market.

Regulatory bodies worldwide are increasingly emphasizing the integration of ESG factors into investment processes. Custodians need to stay abreast of evolving ESG disclosure requirements and ensure that their services align with these standards. This trend not only reflects a response to regulatory expectations but also a strategic move by custodians to support clients in achieving their sustainability goals.

The ESG integration trend is transforming custody services from traditional asset safekeeping to a more comprehensive and values-driven approach. Custodians that proactively embrace this trend are well-positioned to meet the changing demands of investors who seek to align their financial portfolios with their environmental and social values.

## Segmental Insights

### Type Insights

On the basis of type, equity assets remain dominant in the custody service market due to their global popularity, liquidity, and foundational role in investment portfolios. While fixed income and alternative assets are significant, their dominance may be more sector-specific, catering to investors with specific risk and return objectives. The dynamics, however, may evolve with changing market conditions and investor preferences.

Fixed income instruments, while substantial in their own right, may not dominate the custody service market to the same extent as equities. Fixed income securities, including bonds, are valued for their income generation and diversification benefits. However, their liquidity and market dynamics differ from equities, leading to a distinct role in custody services. Alternative assets, encompassing a wide range of investments such as private equity, hedge funds, and real estate, contribute to portfolio diversification but may not dominate the custody market due to their specialized nature and varying liquidity profiles.



## Regional Insights

North America has asserted dominance in the custody service market for several compelling reasons. The region's financial infrastructure, characterized by well-established regulatory frameworks, advanced technological capabilities, and a robust legal environment, positions it as a global leader in custody services. The United States, in particular, boasts a mature and sophisticated financial system, home to major financial institutions and custodians that play pivotal roles in safeguarding and managing assets for institutional investors and high-net-worth individuals.

Moreover, North America's dominance is propelled by its status as a key hub for global finance. The concentration of major financial centers, such as New York and Toronto, facilitates efficient cross-border transactions and fosters a conducive environment for custody services that cater to diverse and complex investment portfolios. Additionally, the region's commitment to innovation and technological advancements has enabled North American custodians to stay ahead in adapting to evolving market trends, including the integration of blockchain technology for digital assets and the implementation of sophisticated data analytics for enhanced reporting capabilities. Overall, North America's leadership in the custody service market is a result of its financial prowess, regulatory stability, global connectivity, and a proactive approach to adopting cutting-edge technologies, making it a preferred destination for institutions seeking secure and efficient custody solutions.

## Key Market Players

Axis Bank Ltd.

DBS Bank Ltd.

Deutsche Bank A.G.

Edelweiss Custodial Services Ltd.

HDFC Bank Ltd.

Hong Kong & Shanghai Banking Corporation Ltd.

ICICI Bank Ltd.

Infrastructure Leasing & Financial Services Ltd.

Kotak Mahindra Bank

Orbis Financial Corporation Ltd.

#### Report Scope:

In this report, the Global Custody Service Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Custody Service Market, By Type:

Equity

Fixed Income

Alternative Assets

Others

#### Custody Service Market, By Service:

Core Custody Services

Ancillary Services

Core Depository Services

Others

#### Custody Service Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Custody Service Market.

### Available Customizations:

Custody Service market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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  - 14.1.7.5. Recent Developments
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- 14.1.10.2. Products & Services
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## **15. STRATEGIC RECOMMENDATIONS**

- 15.1. Key Focus Areas
- 15.2. Target Type
- 15.3. Target Service

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