

Mutual Fund Assets Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Investment Strategy (Equity Strategy, Fixed Income Strategy, Multi Asset/Balanced Strategy, Sustainable Strategy, Money Market Strategy, Others), By Investor Type (Retail, Individual), By Distribution Channel (Direct Sales, Financial Advisor, Broker-Dealer, Banks, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Mutual Fund Assets Market is projected to expand from USD 599.44 Billion in 2025 to USD 905.16 Billion by 2031, reflecting a Compound Annual Growth Rate (CAGR) of 7.11%. These financial instruments function by aggregating capital from multiple investors to acquire a diversified mix of assets, such as equities, bonds, and money market securities. This expansion is largely underpinned by a growing global requirement for retirement planning solutions and an increase in financial literacy among retail investors seeking professional asset management. Furthermore, the spread of digital distribution platforms has played a crucial role in democratizing market access, thereby expanding the capital base by facilitating simpler entry for individual participants.

Despite these favorable conditions, the industry encounters significant obstacles related to market volatility and geopolitical instability, which can trigger asset outflows and diminish net asset values. For instance, data from the International Investment Funds Association indicates that worldwide regulated open-ended fund assets grew to 80.85 trillion United States dollars by the close of the second quarter of 2025, yet external

pressures remain a threat. Additionally, navigating the complex regulatory landscapes of various jurisdictions introduces compliance costs that hinder the efficiency of cross-border distribution and generate operational friction for global asset managers.

Market Driver

The increasing preference for low-cost passive and index-tracking funds is fundamentally altering the global market landscape as investors place greater emphasis on cost efficiency and broad market exposure. This structural change has fueled a significant migration of capital into exchange-traded funds (ETFs), establishing them as primary tools for wealth accumulation over conventional active strategies. According to the '2025 Investment Company Fact Book' by the Investment Company Institute, published in April 2025, net issuance of ETF shares reached a record high of 1.1 trillion United States dollars in 2024. This trend highlights the dominance of passive strategies in attracting fresh capital, prompting global asset managers to broaden their index-based portfolios to secure these persistent inflows.

Concurrently, the movement from traditional savings accounts to capital market products is gaining speed as investors search for better yields within a stabilizing interest rate climate. This momentum is clearly reflected in the substantial inflows into fixed-income sectors, where retail investors are shifting liquidity from bank deposits into managed funds to lock in returns. Data from the European Fund and Asset Management Association's 'Quarterly Statistical Release N°100' in March 2025 reveals that bond funds secured net inflows of 90 billion Euros during the fourth quarter of 2024. Underscoring the magnitude of this asset concentration, BlackRock reported in its 'Third Quarter 2025 Earnings Release' from October 2025 that the firm's assets under management attained a record 13.46 trillion United States dollars, fueled by ongoing organic growth across its platform.

Market Challenge

The consistent growth of the global mutual fund assets market is significantly hindered by elevated market volatility and geopolitical tensions. Whenever geopolitical instability emerges, investor confidence tends to become fragile, resulting in rapid capital withdrawal from riskier assets in favor of safer alternatives. This aversion to risk directly undermines growth momentum by causing substantial redemptions and reducing the net asset values of equity and mixed-asset portfolios. As a result, fund managers encounter diminished liquidity and heightened pressure on performance indicators,

which suppresses overall market accumulation and fosters an unpredictable climate for gathering assets.

The tangible effect of such instability is apparent in recent instances where uncertain global conditions have reversed capital accumulation patterns. According to data from the Investment Company Institute, worldwide regulated open-end fund assets declined by 1.5 percent to 73.86 trillion United States dollars during the fourth quarter of 2024. This contraction demonstrates how abrupt changes in the economic and geopolitical landscape can trigger immediate drops in total assets under management, compelling the industry to deal with shrinking capital bases despite the prevailing long-term demand for professional management and retirement savings.

Market Trends

The landscape of ESG investing is shifting from broad categorization toward rigorous, standardized impact metrics, a change largely propelled by regulatory frameworks like the Sustainable Finance Disclosure Regulation (SFDR). This transition requires asset managers to back their sustainability claims with verifiable data, effectively channeling capital into funds that satisfy strict regulatory standards for environmental alignment and transparency. By advancing beyond superficial branding, the sector is creating a high-quality tier of compliant strategies that appeal to institutional mandates and risk-aware retail capital. As noted in the 'Market Insights: The SFDR fund market' report by the European Fund and Asset Management Association in April 2025, net assets of Article 8 funds, which promote environmental or social characteristics, totaled 9.14 trillion Euros at the end of 2024, emphasizing the market's definitive shift toward regulated sustainability structures.

At the same time, the integration of blockchain technology for asset tokenization is fundamentally modernizing the operational infrastructure of the global mutual fund market. This technological advancement facilitates the issuance and settlement of fund units on distributed ledgers, significantly decreasing administrative friction and providing investors with near-instantaneous liquidity. Through asset tokenization, managers can provide fractional ownership and simplify the intricate back-office procedures linked to traditional transfer agencies, thereby reducing costs and expanding reach to digital-native demographics. Underscoring the magnitude of this developing infrastructure, Calastone's 'Asset managers reveal \$235bn tokenisation opportunity' report from September 2025 projects that the value of tokenized fund assets will grow rapidly from a base of 4 billion United States dollars in 2024, indicating a strong trajectory for blockchain adoption in asset management.

Key Market Players

BlackRock, Inc.

The Vanguard Group, Inc.

Charles Schwab & Co., Inc.

JPMorgan Chase & Co.

FMR LLC

State Street Corporation

Morgan Stanley

BNY Mellon Securities Corp.

Amundi US

The Goldman Sachs Group, Inc.

Report Scope

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

Mutual Fund Assets Market, By Investment Strategy

Equity Strategy

Fixed Income Strategy

Multi Asset/Balanced Strategy

Sustainable Strategy

Money Market Strategy

Others

Mutual Fund Assets Market, By Investor Type

Retail

Individual

Mutual Fund Assets Market, By Distribution Channel

Direct Sales

Financial Advisor

Broker-Dealer

Banks

Others

Mutual Fund Assets 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Mutual Fund Assets Market.

Mutual Fund Assets Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Inves...

Available Customizations:

Global Mutual Fund Assets Market report with the given market data, TechSci 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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