

Wealth in Switzerland: Operations, Strategy and Forecast 2016 – 2021

Wealth in Switzerland Global Market Operations, Strategy, Performance and Forecast to 2021

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Summary

Switzerland is known for its high standard of living and well-developed private banking market, as well as a favorable tax system kept in check by each of the 26 Swiss cantons. These factors, along with the country's favorable level of economic stability, make Switzerland an attractive location for HNW expat investors. While the HNW segment is forecast to grow at an annual rate of over 5% between 2016 and 2020, the rest of the country's affluent population is expected to develop at a much slower pace.

Key Findings

- Switzerland is one of the largest offshore centers in the world, but increased pressure on information exchange has impacted its attractiveness for tax and offshore purposes.
- Nearly half of non-resident deposits are sourced from the Americas, accounting for the largest share of total non-resident retail deposits in Switzerland.
- At the end of 2014, of the 6.6 million adult individuals living in Switzerland an estimated 74.5% could be considered affluent. The country has by far one of the highest levels of affluent and HNW individuals among sizable economies.
- HNW individuals in Switzerland allocate 81.6% of their assets to traditional liquid investments. The Swiss market has a well-balanced allocation outside of deposits, although these still account for 32.8% of total retail investments.
- Switzerland has signed numerous agreements to improve collaboration with other nations, and previously reached a Model II Foreign Account Tax Compliance Act agreement with the US. From January 1, 2017, Switzerland will also start exchanging information under the OECD's Common Reporting Standard.

Synopsis

"[Wealth in Switzerland: Sizing the Market Opportunity 2016](#)" analyzes the Swiss wealth and retail savings and investments markets, with a focus on the HNW segment. The report is based on our proprietary datasets. Specifically the report:

- Sizes the affluent market (both by number of individuals and the value of their liquid assets) using



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our proprietary datasets.

- Analyzes which asset classes are favored by Swiss investors and how their preferences impact the growth of the total savings and investments market.
- Examines HNW clients' attitudes towards non-liquid investments such as property and commodities.
- Identifies key drivers and booking centers for offshore investments.
- Examines the tax landscape in Switzerland and future implications for investors.

Reasons to Buy

- Benchmark your share of the Swiss wealth market against the current market size.
- Forecast your future growth prospects using our projections for the market to 2020.
- Identify your most promising client segment by analyzing penetration of affluent individuals in Switzerland.
- Evaluate your HNW proposition by understanding how the Swiss tax system impacts HNW clients.
- Review your offshore strategy by identifying HNW motivations for offshore investments and their preferred booking centers.

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EXECUTIVE SUMMARY

The Swiss HNW market is forecast to grow at an annual rate of more than 5%

Key findings

Critical success factors

SIZING AND FORECASTING THE SWISS WEALTH MARKET

Switzerland's offshore market is undergoing change

Tax transparency is causing the onshore and offshore wealth markets to diverge

Offshore deposits constitute the largest proportion of non-resident assets

Switzerland's resident and non-resident mutual fund markets display inverse market share growth

The Swiss non-resident retail deposit market is growing

Affluent individuals in Switzerland account for 74.5% of the total adult population

Switzerland has one of the highest levels of affluent individuals among sizable economies

Swiss affluent individuals held over \$1,177bn in liquid assets in 2015

DRIVERS FOR GROWTH IN THE SWISS WEALTH MARKET

Growth rates will improve from 2016 after a strong downswing in 2014

The Swiss market is well diversified, with substantial non-deposit holdings

Deposits, equities, and mutual funds will drive growth

Deposits will continue to outperform real GDP growth

Deposits will see steady growth following a lower year-on-year growth rate in 2014

Equities and mutual fund holdings are driven by stock market performance

The Swiss stock market has displayed relatively steady growth in 2016

The performance of the stock market has driven equity and mutual funds

Bond investments are forecast to taper from 2017

HNW INVESTMENT PREFERENCES

HNW individuals allocate 18.4% of their investible assets outside traditional investments

Hedge funds make up the bulk of investments held outside traditional asset classes

Swiss HNW individuals hold 17.9% of their wealth offshore

Tax is a limited driver for offshore investment

Swiss HNW offshore wealth is booked through centers around the world

Switzerland has signed numerous DTCs and information exchange agreements

Switzerland and the US have agreed to a program to settle the ongoing tax dispute between the two countries

[market-opportunity-2016](#)

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