

HNW Asset Allocation Global Market Segmentation and Major Players Analysis 2022

HNW Asset Allocation Global Market 2016 Analysis and Forecast to 2021

PUNE, INDIA, December 22, 2016
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Summary

There is no single driver influencing HNW investment preferences. On the contrary, investment choices are determined by interplay of factors such as risk preference, economic forces, and investor attitudes. As we enter 2016 we expect a reallocation of assets, benefiting alternative investment holdings globally. At the same time, HNW investors are looking for cheap buying opportunities in the equity space.

Key Findings

- The most striking trend is the surge in alternatives, which constitute an increasingly large share of the typical portfolio as investors seek diversification from traditional investments. We are also seeing rising demand for exchange-traded funds, which thanks to the diversification they provide and their low costs are rapidly growing in popularity.
- Drawn in by capital appreciation opportunities, investors are forecast to channel more wealth into equities. This trend will be particularly pronounced in Europe, where investors are hoping that loose monetary conditions will finally stimulate equity markets.
- In the fixed income space, HNW investors are moving out of high-yield bonds, with investor concern mounting as volatility in the junk bond market persists. In many global markets wealth managers will have a tough time promoting bond holdings in general. Their best bet will be bond funds thanks to the diversification benefits they provide.

Synopsis

"[HNW Asset Allocation Trends](#)" draws on our 2015 Global Wealth Managers Survey to analyze HNW asset allocation strategies in 20 key markets. In particular, it examines the drivers behind investment choices now and over the next 12 months. Draws on our proprietary 2015 Global Wealth Managers Survey to present consistent data across 20 markets.

- Analyze HNW asset allocation strategies in 20 key HNW markets including Australia, the UK, and the US.
- Understand the drivers that determine HNW investment preferences.
- Interpret the macroeconomic, demographic, and attitudinal trends that are shaping HNW investment behavior.
- Accompanied by an online interactive dashboard to enable users to select and view the data of their choosing.



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Reasons to Buy

- Get fact-based insight into HNW investors' asset allocation preferences from our proprietary 2015 Global Wealth Managers Survey.
- Remain a step ahead of competitors by anticipating investment trends and adjusting your service proposition accordingly to cater to HNW investors' changing investment preferences.
- Be able to service HNW investors more thoroughly by understanding what is driving investment choices and how asset allocation strategies are going to change over the next 12 months.

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HNW investment preferences are shaped by a multitude of factors

Key findings

Critical success factors

REGIONAL ASSET ALLOCATION TRENDS

The global HNW portfolio is well diversified

Equities dominate the typical HNW portfolio

Alternative investments have become more popular, at the expense of bonds

Despite recent downturns, commodities continue to find a place in the typical HNW portfolio

Detailed analysis shows HNW investors have strong appetite for direct equity, local currency products, equity funds, and direct property

Direct holdings constitute the bulk of equity investments, but ETPs are growing in popularity

Bond funds are the preferred type of fixed income investment

Local currency products prevail as part of HNW investors' cash investments, but there are exceptions

High direct property holdings limit wealth managers' fee-earning potential

Hedge funds have emerged as the preferred alternative investment among HNW investors

Commodity ETPs have overtaken mutual funds in popularity

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