

Equity Portfolio Management and Advisory Services Market : Global Opportunity Analysis and Industry Forecast, 2023-2032

The demand for equity portfolio management & advisory services has experienced substantial growth & is expected to expand, owing to increase in disposable income

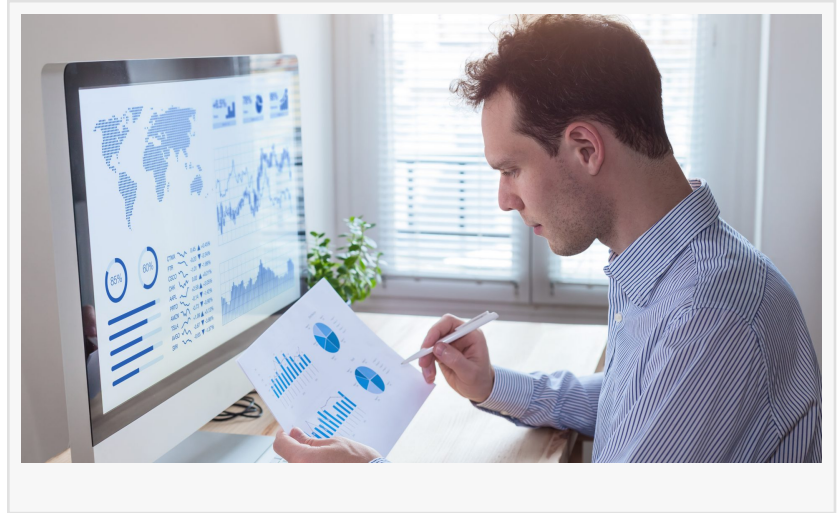
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/EINPresswire.com/ -- An equity

portfolio comprises a collection of stock market investments. Equity

management is a service that allows individuals to consult experts before

investing or making changes to their portfolios. As these professionals in equity advisory management have experience in equity investment areas, they offer advice to specific situation of a person's portfolio. Their personalized advice is considered fit for client's own risk profile. As a result, equity portfolio advisors can actively track the market environment and review value of company's information.



The major drivers of [equity portfolio management and advisory services market](#) include increase in interest on investments, growth in disposable capital, and shifting investment trend from financial assets to physical assets. In addition, higher market volatility, and lack of market expertise among retail investors also drive the market growth. However, several factors, such as liquidity risks and higher equity risks relative to other funds are expected to hinder the market growth. Furthermore, untapped market in developing economies is expected to create lucrative opportunities for the market during the forecasted period.

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New advancements in the equity portfolio and advisory services market:

Technology has been continuously transforming these portfolio advisory services in recent years.

Innovations from FinTech such as robot advisors are widely adopted in portfolio advisory environments. Similarly, many advisory firms are now offering services through online platforms. For instance, in May 2020, WealthBar, online advisory service platform started offering advices through automated software. The risk taking capabilities of clients is calculated by questionnaire feedbacks through automated software. Several major players such as Charles Schwab Corporation and BMB Investments have already adopted such technology in recent years.

Surge in asset allocations into equity stocks:

Globally, the need for portfolio management and advisory services has expanded exponentially in last few years. Since 2009, the equity assets under active portfolio management increased from \$2.4 trillion to \$3.5 trillion. In addition, equity portfolio management also experienced growth in Europe, as of 2017 assets allocation in equity segment accounts for 42% share. Similarly, in developing countries such as India, assets under management in discretionary equity portfolios increased by 41% .Such surge in asset allocations in developed as well as developing economies drive the adoption of equity portfolio management & advisory services in the industry.

COVID-19 Scenario analysis:

COVID-19 has affected market volatility and triggered significant fluctuations in stock asset values.

Globally, the stock market has collapsed by 25% as of March 2020. The impact on equity markets led managers to re-consider positions in investment portfolios.

Owing to extreme COVID 19 effect, assets under management (AUM) are expected to fall by 20 to 30%.

Moreover, COVID-19 has also triggered regulations for changes in fees, commissions, advice, risk assessment, margin exposures, investment strategies, and portfolio valuations.

This impact has resulted in loss of client's confidence on portfolio managers COVID-19 left portfolio managers with challenges in enhancing and restoring consumer trust in their investment portfolios.

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Key benefits of the report:

This study presents analytical depiction of the global equity portfolio management and advisory services market along with the current trends and future estimations to determine the imminent investment pockets.

The report presents information related to key drivers, restraints, and opportunities along with detailed analysis of the market share.

The current market is quantitatively analyzed to highlight the market growth scenario.

Porter's five forces analysis illustrates the potency of buyers & suppliers in the market.

The report provides a detailed market analysis based on the present and future competitive intensity of the market.

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Equity Portfolio Management and Advisory Services Market Report Highlights

By Type

- Equity investment
- Portfolio management
- Investment advisory

By Application

- Transaction services
- Crisis and recovery
- Risk Management

By End User

- Financial institutions
- Retail investors

By Region

- North America (U.S., Canada)
- Europe (UK, Germany, France, Spain, Italy, Rest of Europe)
- Asia-Pacific (China, Japan, India, Australia, South Korea, Rest of Asia-Pacific)
- LAMEA (Latin America, Middle East, Africa)

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