

Equity Portfolio Management & Advisory Services Market: Opportunities (2023-2032), Driven by AI & WealthTech Innovations

Equity Portfolio Management & Advisory Services Market: Global Trends & Opportunities (2023-2032), Driven by AI & WealthTech Innovations

NEW CASTLE, DE, UNITED STATES, February 19, 2025 /EINPresswire.com/ -- Over the past few years, the demand for [equity portfolio management and advisory services](#) has experienced substantial growth and is expected to expand, owing to increase in disposable income and awareness toward investment awareness. 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 advices 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.

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Top impacting factors: Market Scenario Analysis, Trends, Drivers, and Impact Analysis: 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.

The global equity portfolio management and advisory trends are as follows:

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.

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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.

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.

Questions answered in the global equity portfolio management and advisory services market research report:

Who are the leading market players active in the global equity portfolio management and advisory services market?

What would be the detailed impact of COVID-19 on the global equity portfolio management and advisory services market?

What current trends would influence the market in the next few years?

What are the driving factors, restraints, and opportunities in the global equity portfolio management and advisory services market?

What are the projections for the future that would help in taking further strategic steps?

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Equity Portfolio Management and Advisory Services Market Report Highlights
Aspects Details

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)

Key Market Players

BlackRock, Inc., JPMorgan Chase & Co., Vanguard Group, Franklin Resources Inc., State Street Corporation, Invesco Ltd., Goldman Sachs Group, Inc., Northern TrU.S.t Corporation, Fidelity Investments Inc., PIMCO

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Pet Insurance Market <https://www.alliedmarketresearch.com/pet-insurance-market>

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Impact Investing Market <https://www.alliedmarketresearch.com/impact-investing-market-A53663>

Surety Market <https://www.alliedmarketresearch.com/surety-market-A31385>

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