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NEW CASTLE, DE, UNITED STATES, November 12, 2025 /EINPresswire.com/ -- According to a new report published by Allied Market Research, titled, “Mutual Fund Assets Market," The mutual fund assets market size was valued at $55,851.0 billion in 2024, and is estimated to reach $95,815.0 billion by 2034, growing at a CAGR of 5.4% from 2025 to 2034.

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Mutual fund assets refer to the total value of all the investments held within a mutual fund. These assets include stocks, bonds, money market instruments, and other securities purchased using pooled money from investors. The value of mutual fund assets fluctuates based on market performance and investor activity. Asset size is a key indicator of a fund’s scale and can influence its management style, liquidity, and expense ratio. Regular valuation of these assets helps determine the fund’s Net Asset Value (NAV), which is crucial for pricing and trading mutual fund shares. One of the significant mutual fund assets market trends is the rapid growth in retail participation, especially through Systematic Investment Plans (SIPs), which have reached high records in monthly contributions. In addition, there is a growing trend toward the adoption of digital platforms and direct mutual fund plans, enabling tech-savvy and younger investors to manage their investments independently and cost-effectively. Furthermore, the rise of passive investing is gaining traction, with index funds, ETFs, and gold ETFs attracting substantial inflows due to their low fees and simplicity. Another notable trend in the market is the expansion of mutual fund penetration beyond urban centers, reflecting deeper financial inclusion. In addition, there is a shift in preference toward thematic and sector-based funds, particularly in infrastructure, healthcare, and technology, as investors seek targeted exposure to high-growth sectors. These evolving trends are expected to accelerate the mutual fund assets market growth in the upcoming years.

The major factor driving the growth of the global mutual fund assets market is the rising awareness and accessibility of investment options among retail investors. With increasing financial literacy and the proliferation of digital platforms, more individuals are actively participating in mutual fund investments. Mobile applications, robo-advisors, and online investment portals have significantly lowered entry barriers, enabling even first-time investors to invest with ease and confidence. In addition, the shift from traditional saving methods, such as fixed deposits, to market-linked instruments is further fueling this growth during the mutual fund assets market forecast period. Furthermore, the surge in the demand for wealth creation, tax-efficient investments, and retirement planning solutions is prompting investors to diversify their portfolios through mutual funds. In addition, governments and regulatory bodies worldwide are supporting this trend by introducing favorable policies, ensuring transparency, and enhancing investor protection. Moreover, the rise in middle class, especially in emerging economies, and the growing preference for professionally managed portfolios contribute toward the overall expansion of the global mutual fund assets market.

Moreover, the mutual fund assets market outlook indicates that the integration of advanced technologies such as artificial intelligence (AI), big data analytics, and blockchain is enhancing operational efficiency and trust in the mutual fund industry. Fund managers are leveraging these tools to improve decision-making, personalize investment strategies, and ensure better risk management, which in turn boosts investor confidence. Additionally, ESG (Environmental, Social, and Governance) investing is gaining traction, prompting mutual funds to offer sustainable and socially responsible investment options. This trend aligns with the values of younger, socially conscious investors, further widening the investor base. Cross-border fund distribution is also expanding due to international collaborations and regulatory harmonization, allowing fund houses to tap into new markets. Collectively, these factors are accelerating the global mutual fund assets market's upward trajectory.

On the basis of type, the global [mutual fund assets market share]() was dominated by the active segment in 2024 and is expected to maintain its dominance in the upcoming years, owing to the increase in demand for personalized investment strategies and active risk management. In addition, there is a growing trend toward actively managed funds that seek to outperform benchmarks through skilled portfolio selection. However, the passive segment is expected to experience the highest growth during the forecast period. This segment is experiencing a surge in popularity due to its lower fees, transparency, and the increasing adoption of index-based investment approaches by both retail and institutional investors.

By region, North America dominated the mutual fund assets market share in 2024. This was due to the well-established financial infrastructure, high investor awareness, and strong presence of major asset management firms. However, LAMEA is expected to experience the fastest growth during the forecast period. The region is experiencing an increase in the adoption of investment products among a growing middle-class population, presenting numerous opportunities for financial inclusion, expansion of mutual fund offerings, and development of regulatory frameworks, which is expected to support the growth of the market in the region.

Key findings of the study

By Fund Type, the equity funds segment held the largest share in the mutual fund assets market for 2024.

By Distribution Channel, the financial advisors/brokers segment held the largest share in the mutual fund assets market for 2024.

By Type, the active segment held the largest share in the mutual fund assets market for 2024.

Region-wise, North America held the largest market share in 2024. However, LAMEA is expected to witness the highest CAGR during the forecast period.

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The key players profiled in the mutual fund assets market analysis are BlackRock, Inc., The Vanguard Group, Inc., Charles Schwab & Co., Inc., JPMorgan Chase & Co., State Street Corporation, Deutsche Bank AG, Schroders plc, Franklin Templeton, Fidelity Investment, Invesco Ltd., T.Rowe Price Group, PIMCO, Capital Group, BNP Paribas, Goldman Sachs, Banco do Brasil, Sanlam investments, Nikko Asset Management Co., Ltd., Morgan Stanley, and Mirae Asset Financial Group. These players have adopted various strategies to increase their market penetration and strengthen their position in the mutual fund assets industry.

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