

Asian Distribution Dynamics 2020

Gaining the Competitive Edge



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OVERVIEW & METHODOLOGY

In its 19th iteration, this annual report sizes and identifies opportunities in Asia ex-Japan's mutual fund markets. Asia's mutual fund industry is embracing changes on multiple fronts to keep pace with current product trends, digital marketing and sales strategies, and opportunities in the high-net-worth (HNW) and retirement segments. Covering the six key markets of China, Hong Kong, India, Korea, Singapore, and Taiwan, this report focuses on major topics such as market sizing, product trends, distribution strategies, revenue projection, and fee analysis. The report also showcases findings from distributor surveys on fund selection and digital sales strategies.

Key region-wide themes include:

- Product trends in each of the six markets and the popularity of fixed-income funds across the region
- HNW investing trends and scope for product development
- Tapping opportunities in the retail retirement segment
- Digital sales and marketing strategies, and key success factors

USE THIS REPORT TO

- Size the key six markets in Asia in terms of assets, net flows, product trends, marketing and distribution practices, fees, competitive landscapes, and revenues
- Analyze product trends across different markets and outlook on the investment themes over the next several years
- Understand the varying needs and preferences of HNW investors across different Asian markets, as well as the potential of the discretionary portfolio management business
- Learn about current retirement initiatives, regulatory developments and reforms, and the opportunities that these could bring to managers in the retail segment
- Explore managers' key marketing priorities, budgets, and plans with regard to traditional and digital advertising

QUESTIONS ANSWERED

- How are product trends unfolding in Asia's various markets?
- What are the key investment considerations among Asia's growing wealthy clientele?
- Which Asian markets are most lucrative in terms of retail retirement opportunities?
- How are Asian managers changing their marketing and sales strategies with the growing need for digitalization?

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- **Mutual Fund Industry Overview:** Explore mutual fund asset compound annual growth rates (CAGRs) and assets under management (AUM) by year, investment objective, and domicile for the six key markets in Asia. Examine annual net new flows by investment objective for each country.
- **Mutual Fund Distribution Landscape:** Review mutual fund AUM in Asia ex-Japan by distribution channel and bank type, and understand asset managers' views on the three-year outlook of distribution channel use. This data can also be segmented and compared on a country-by-country level.
- **Product Trends Across Asia:** Explore a side-by-side comparison of asset managers' views in each country on top broad fund strategies most likely to be promoted to distributors and the fund strategies that HNW and ultra-UHNW clients are looking for. Additionally, compare the views of managers and distributors on mutual fund product features that are most important to investors.
- **Digital Marketing and Sales:** Understand managers' opinions, country by country, on the impact that various marketing parameters have on their success and their budget plans over the next two years.

Exhibit 1.09

Asia ex-Japan Distributors' Views on Factors Important in Selecting a Fund, 2020

Source: Cerulli Associates

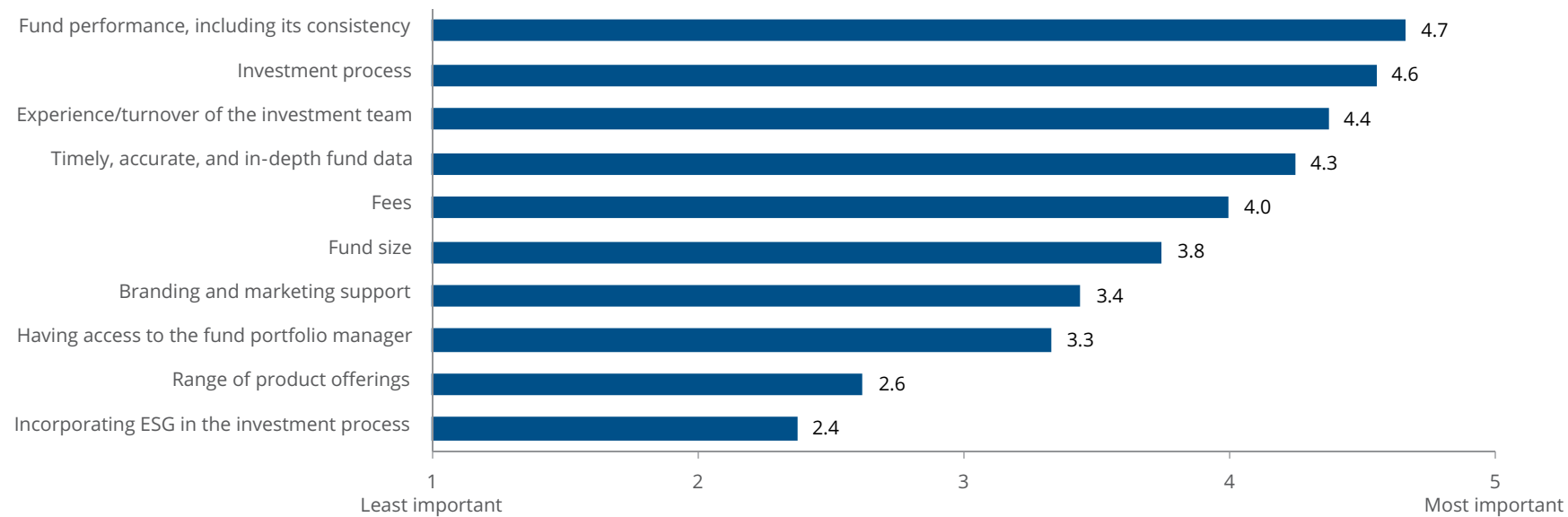


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