

# Institutional Asset Management in Asia 2020

*Setting the Stage for a New Era*

## OVERVIEW & METHODOLOGY

This report takes a comprehensive examination of the Asia-Pacific region's institutional landscape and outsourcing opportunities for external asset managers. It builds on our previous research on Asian pensions, sovereign wealth funds, insurers, and other institutions, and complements all our other Asian publications. The report focuses on market sizing and addressability, institutions' investment behavior, strategies and allocation plans, outsourcing practices, manager selection, use of consultants, and other trends in Asia's institutional asset management industry.

The report explores three region-wide themes—the evolution of institutional sales, demand for alternative strategies, and de-risking and liquidity management among institutions. It also assesses the opportunities and challenges in the Australia and New Zealand institutional markets. This is followed by in-depth analysis of the institutional markets of China, Hong Kong, Japan, Korea, Singapore, and Taiwan.

## USE THIS REPORT TO

- Analyze insourcing and fintech adoption trends among Asian institutions and how managers are evolving their business strategies and offerings to cope with the changes
- Pinpoint opportunities within the alternatives segment, in terms of strategy preferences, strategic partnerships, and outsourcing requirements
- Identify key trends among institutions in terms of investment behavior and preferred strategies to navigate through the pandemic
- Gain insight into the expansion of market coverage in Japan, Australia, and New Zealand in terms of market sizing, addressability, opportunities, and challenges for managers

## QUESTIONS ANSWERED

- What are the key concerns brought about by COVID-19 and its impact on managers and institutions?
- Where do managers see growth potential and outsourcing opportunities among the various institutional types and across markets?
- How are managers adapting their methods of engagement and evolving their portfolio management services to suit the needs of their institutional clients?
- What are the areas of interest and considerations that institutions have for their alternative investments?
- Which other types of strategies are institutions looking out for to help de-risk portfolios and navigate through the pandemic?
- Where are the opportunities for managers in Australia and New Zealand, and what kind of challenges lie ahead of them?

## PRODUCT DETAILS

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- Digital report in PDF format
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- Exhibits in Excel
- Key findings
- Analyst support
- Interactive Report Dashboards

### Interactive Report Dashboards

*Interact and explore select report data with Cerulli's visualization tool.*

- **Regional Overview:** Compare institutional market sizing in the Asia-Pacific region, which includes investable assets by market, year, and institution type, as well as forecasted investable and addressable assets.
- **Institutional Type Analysis:** Evaluate and compare the retirement, insurance, and sovereign wealth fund markets in Asia ex-Japan, with interactive data covering investable and addressable assets segmented by year, investment objective, and asset class.
- **Institutional Sales and Strategies:**
  - Gain an understanding of asset managers' views on considerations that gatekeepers have for manager evaluation, factors that increase the chances of winning mandates, views on the effectiveness of digital solutions in maintaining and acquiring new institutional mandates, strategies clients are likely to seek in the near term, the impact of COVID-19, and the role of alternatives.
  - Analyze asset owners' sentiments on insourcing challenges, key outsourcing considerations, factors taken into account when making investment decisions and selecting managers, effectiveness of digital solutions in the investment process and methods of adoption, major hurdles faced during digital adoption, changes as a result of COVID-19, and the role of alternatives in investment portfolios.



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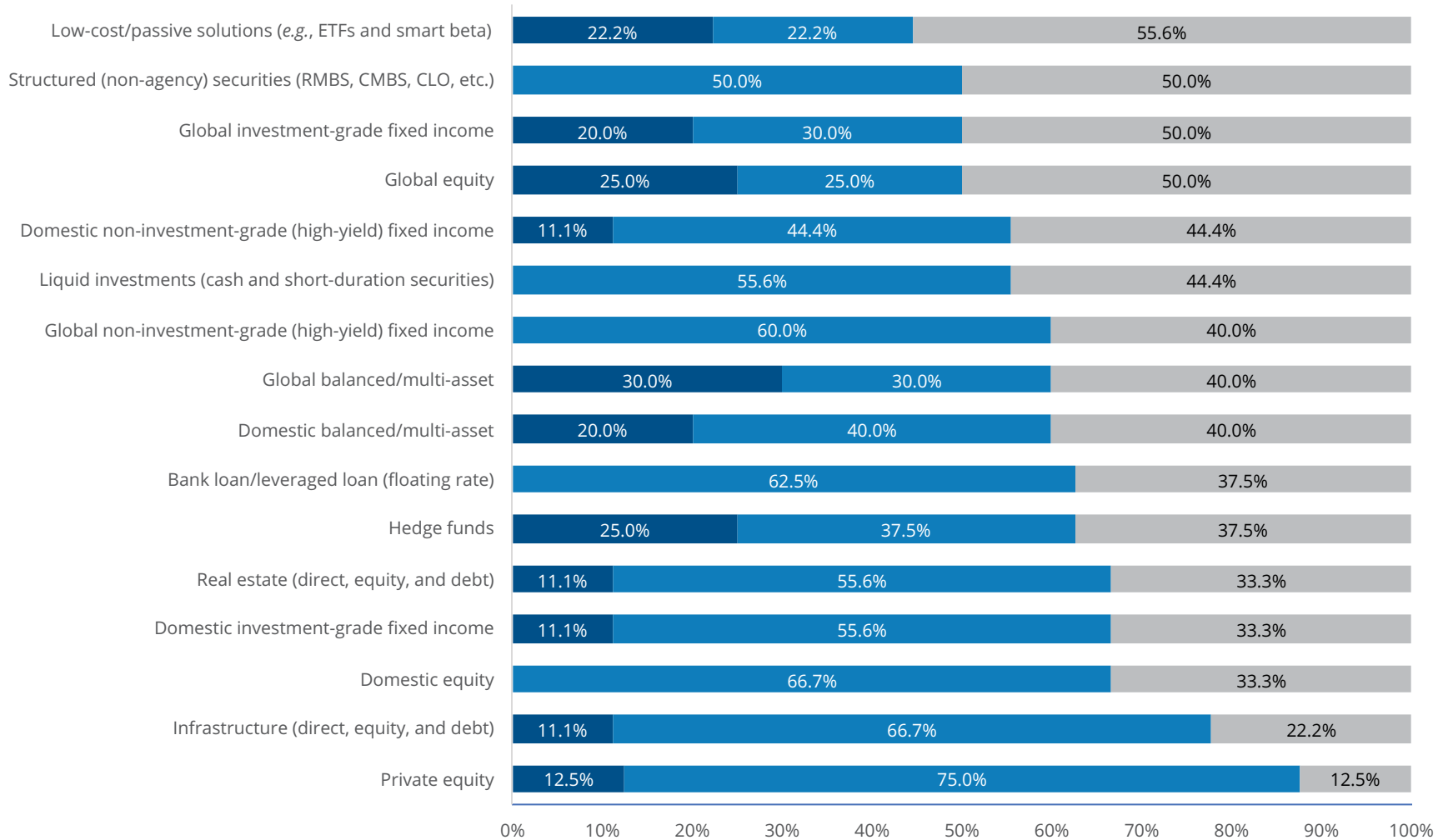
**Exhibit 3.05**

**Asia ex-Japan Managers' Views on Fee Pressure Changes Across Strategies in the Next 1–3 Years, 2020**

Source: Cerulli Associates

Analyst Note: Regional managers with businesses in multiple countries in the region were surveyed. Results are shown as a percentage of the respondents.

■ Decrease ■ No change ■ Increase



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