

Wealth Management Platform Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

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Report description:

The global wealth management platform market size reached US\$ 4.4 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 9.3 Billion by 2028, exhibiting a growth rate (CAGR) of 12.7% during 2023-2028.

A wealth management platform is a software deployed for planning, analyzing, monitoring, and controlling specialized financial services. It is widely used as an investment advisory service that combines other financial services to address the needs of affluent clients. It includes financial goal planning, legal and tax advice, estate planning, complete wealth overview, personal retail banking services, portfolio management capabilities, and investment management services. These platforms are widely used by enterprises to streamline operations, deliver consistent advice across channels, and manage multiple and complex investment programs from one solution. Wealth management platforms aid in reducing manual processes, errors, risk, financial stress, complexities, improving investment decisions, creativity, production cycles, and cost-effectiveness. As a result, it is widely used in banks, brokerage, investment management and trading firms.

Wealth Management Platform Market Trends:

Increasing digitalization across the globe is creating a positive outlook for the market. The wealth management platform assists businesses to gain insights and enhance decision-making to improve profitability and efficiency. Additionally, the widespread product adoption in trading and exchange firms to manage multiple clients efficiently, understand the process of financial portfolio, and access trading accounts is favoring the market growth. Moreover, various technological advancements, such as the introduction of digital wealth management platforms, to provide financial firms with the latest integrated tools and data-driven analytics are providing an impetus to the market growth. In line with this, the integration of artificial intelligence (AI) to efficiently track expenditure, identify investment preferences, and provide personalized and curated advice for the clients is positively impacting the market growth. Apart from this, the rising disposable incomes, particularly in emerging economies, and the implementation of various stringent government compliances related to the financial sector are anticipated to drive the market toward growth further.

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Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each sub-segment of the global wealth management platform market report, along with forecasts at the global, regional and country level from 2023-2028. Our report has categorized the market based on advisory model, deployment mode, business function, enterprise size and end use industry.

Breakup by Advisory Model:

- Hybrid
- Robo Advisory
- Human Advisory

Breakup by Deployment Mode:

- On-premises
- Cloud-based

Breakup by Business Function:

- Reporting
- Performance Management
- Financial Advice Management
- Risk and Compliance Management
- Portfolio, Accounting and Trading Management
- Others

Breakup by Enterprise Size:

- Large Enterprises
- Small and Medium-sized Enterprises

Breakup by End Use Industry:

- Banks
- Brokerage Firms
- Investment Management Firms
- Trading and Exchange Firms
- Others

Breakup by Region:

- North America
 - United States
 - Canada
- Asia-Pacific
 - China
 - Japan

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India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Competitive Landscape:

The competitive landscape of the industry has also been examined along with the profiles of the key players being Avaloq (NEC Corporation), Backbase, Broadridge Financial Solutions Inc., Comarch SA, Crealogix AG, Fidelity National Information Services Inc., Fiserv Inc., Infosys Limited, Profile Systems and Software S.A., Prometeia S.p.A, SEI Investments Company, SS&C Technologies Inc., Tata Consultancy Services Limited and Temenos Headquarters SA.

Key Questions Answered in This Report

1. What was the size of the global wealth management platform market in 2022?
2. What is the expected growth rate of the global wealth management platform market during 2023-2028?
3. What are the key factors driving the global wealth management platform market?
4. What has been the impact of COVID-19 on the global wealth management platform market?
5. What is the breakup of the global wealth management platform market based on the advisory model?
6. What is the breakup of the global wealth management platform market based on the deployment mode?
7. What is the breakup of the global wealth management platform market based on end use industry?
8. What are the key regions in the global wealth management platform market?
9. Who are the key players/companies in the global wealth management platform market?

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