

**Japan WealthTech Solutions Market Assessment, By Component [Solution, Services],
By Deployment Mode [On-premises, Cloud], By Enterprise [Large Enterprises, Small
and Medium Enterprises], By End-user [Banking, Investment Firms, Wealth
Management Firms, Others], By Region, Opportunities and Forecast,
FY2018-FY2032F**

Market Report | 2024-09-30 | 130 pages | Market Xcel - Markets and Data

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Report description:

Japan WealthTech solutions market is projected to witness a CAGR of 14.62% during the forecast period FY2025-FY2032, growing from USD 180.45 million in FY2024 to USD 537.58 million in FY2032. The market is constantly evolving, influenced by a variety of leading trends, including the growth of robo-advisors that transform investment management with their automated and personalized strategies, AI and machine learning, which are transforming financial services with more accurate predictions and user-experiences, and micro-investing, making investment opportunities increasingly available by letting people invest at a small-scale. With the growing interest in blockchain technology and cryptocurrencies, firms are looking for new investment opportunity channels. Through a regulatory environment, the Japanese government propels innovations in fintech. Digital wallets and payment solutions are continuously being integrated into the country to provide refined user experiences. There is an ever-increasing demand for investment products in the world that mirror environmental, social, and governance (ESG) criteria, reflecting the change to green economies that the world is going through.

WealthTech is a combination of wealth management and technology. This business has rapidly become one of the most transformational sectors in Japan fintech market. In Feb 2024, Mitsubishi UFJ Financial Group Inc. announced that its core banking unit, MUFG Bank Ltd, would buy a 15.55% stake in robo-advisor firm WealthNavi Inc. in a deal worth about USD 104.15 million (JPY 15.65 billion). The tie-up now intends to leverage MUFG Bank's widespread customer network and WealthNavi's know-how in automated investment advice to further develop the financial services available to consumers.

Growth of the Fintech Sector Fuels Market Expansion

FinTech in Japan acts as market fuel by disrupting the delivery of financial services online and through mobile channels. This shift has digitized critical processes in such a way that financial solutions have turned out to be faster and more convenient at a reasonable cost. The restoration of confidence in fintechs among banks, insurance companies, asset managers, and consumers aided in the recovery phase of the global economy by the general adoption of high-speed and safe internet and mobile technologies. This growing confidence has, in turn, influenced banks and insurers to invest in fintechs to boost profitability and further attract the interest of younger customers. Increased funding from venture capital and private equity has driven the fast growth of fintech companies that are following hyper-growth strategies. These financial service innovations result in strategies, further causing growth spurts in the WealthTech solutions market of Japan by enhancing investment management and providing access to global avenues for cost-efficient and revenue-generating solutions. For Instance, Gojo & Company, Inc. has successfully raised an additional USD 30.8 million in the final close of their Series E fundraising in February 2023. The cumulative Series E financing amount has reached USD 100 million.

Rise in Digitalization to Propel Market Growth

Digitalization is proving to be one of the latest market trends, and wealth management has started to take up this platform. WealthTech solutions are at the helm in this shift from traditional methods of wealth management. Integrated digital tools, AI, and machine learning make these solutions imperative for property management firms and high-net-worth individuals. The contribution of rapid internet expansion and increased interest among millennials in fintech have driven this shift. On mobile, speeds rose from 40.75 Mbps in July 2023 to 46.70 Mbps in July 2024, while fixed broadband rose from 145.49 Mbps to 194.05 Mbps, the latter indicating wired Internet services to gain significant upgrades. These increases seem indicative of continuing upgrades to network infrastructure and technology for faster and more reliable online access with both kinds of connections. AI and machine learning enhance decision-making as they enable big data analysis in user-friendly formats. Cloud technologies, security solutions, and open-source banking systems form part of the WealthTech solutions to ensure data security and transparency for customers. Process automation, outsourcing, and robo-advisory services continue to hold more value for ultrahigh-net-worth and high-net-worth clients. Predictive analytics technologies powered by machine learning mean better portfolio rebalancing, cost transparency, and AI-driven customer service.

Solution Segment Dominates the Market

The solution segment has seen maximum growth, mainly driven by the rapid adoption of technology in wealth management across individuals and companies. This change in trend is driven by the emergence of an overall digital financial ecosystem based on SaaS, big data, and AI. At the same time, these are the exact building blocks that are changing international money flows structurally and, hence, form the critical factors in the evolution of the market. In August 2024, Fundrise Innovation Fund invested in Immuta, the Leading Provider of Governance and Security Software for Modern Data Infrastructure. This investment is an extensive validation of the future potential of the platform, running at this stage as a market leader in the space. Besides that, UI/UX feature enhancements have played a role in this growth. The new and more dynamic UI/UX features incorporated within the modern solutions make these platforms convenient to use and substantially improve the end-user's overall experience. This further accelerates simplification and enhances functionality, which adds to the rapid growth and development of the WealthTech solutions market in Japan.

Central Region Dominates the Japan WealthTech Solutions Market

In Japan, the main concentration of the WealthTech solutions market is found in the central region, around Tokyo, in the Kanto area, serving as a substantial financial hub of the country. It is the major city in the world financial center and one of the most densely populated cities by high-net-worth individuals, with a strong driving force for the development of the city's WealthTech industry due to advanced technological infrastructure. At the same time, a vibrant startup environment with a strong representation of financial institutions encourages and affirms innovation in wealth management solutions.

The southern region is becoming an increasingly important player in Japan WealthTech solutions market. Cities such as Osaka in the Kansai area have become important financial centers, with more investment poured and a rising ecosystem of tech startups and financial services firms. This regional growth has been driven by economic diversification, local talent, and appropriate infrastructure development that has further enhanced digital financial services.

Future Market Scenario (FY2025 - FY2032F)

- Artificial intelligence is making financial decisions more effective by providing better risk assessment models and automating

investment processes.

- The interface of WealthTech solutions is designed to be user-friendly, direct, clear, and easy to understand, with engaging content to help consumers make financial planning and investment decisions by consumers.

- Investments and property management companies are betting on cryptocurrencies and blockchain technology to disrupt investment and asset management practices.

Key Players Landscape and Outlook

With many emerging players, Japan WealthTech solutions market is becoming more crowded. The market is of prime importance for the innovators of WealthTech solutions, where the market size is in the form of in-house or outsourced technology. Companies in WealthTech are focusing on the transformation of the industry, identifying inefficiencies along the value chain. Key companies try to deploy benefits that include effective portfolio management, increased asset liquidity, an enhanced customer experience, a clear view into costs, better advice, more accessible transaction technologies, and opening the market for alternative investments with private equity and hedge funds.

In July 2024, Thought Machine, the cloud-native banking technology company, and Quantifeed, the leading provider of digital wealth management solutions, announced a new partnership, bringing their joint capabilities to service the private banking sector worldwide. Quantifeed's QEngine platform and Thought Machine's Vault Core offer a truly comprehensive solution for private banks. The integrated system brings together the front, middle, and back offices, enabling a bank's ability to navigate and migrate from monolithic legacy technology and develop new investment products, as well as distribution channels.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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