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Global Trends in Asset Management

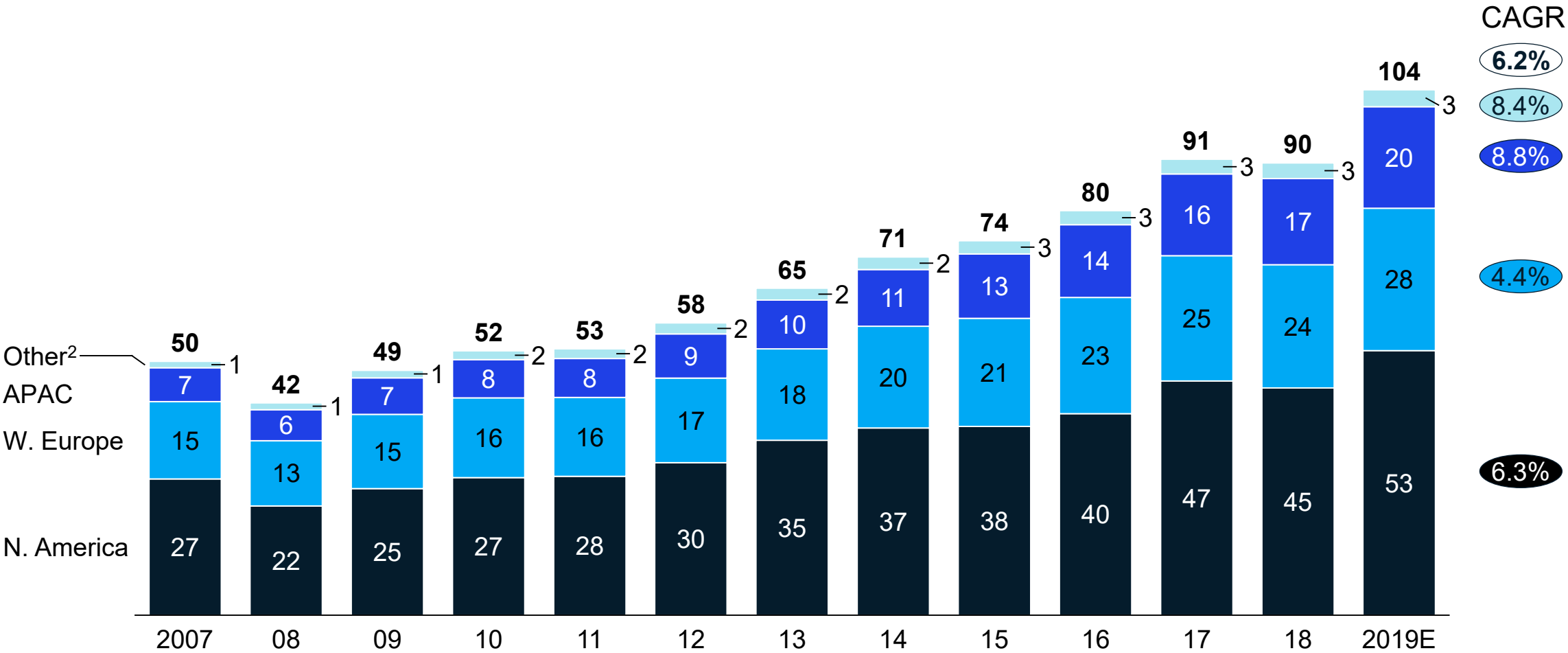
January 2020

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Global assets under management are at record highs

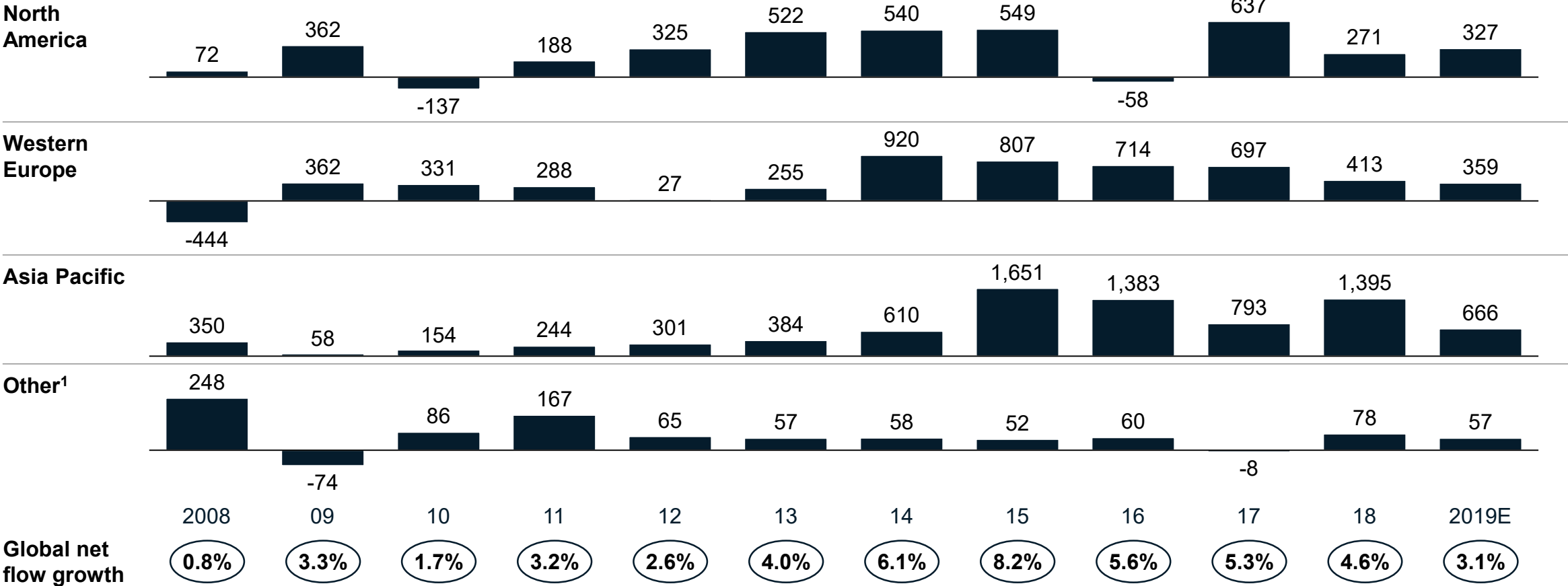
Assets Under Management by major geographic region, \$ trillions¹



¹ Third-party managed assets
² Includes Latin America, Middle East, and Africa

Asia Pacific has led global organic net flow growth since 2015

Net flows by major geographic region, \$ billions

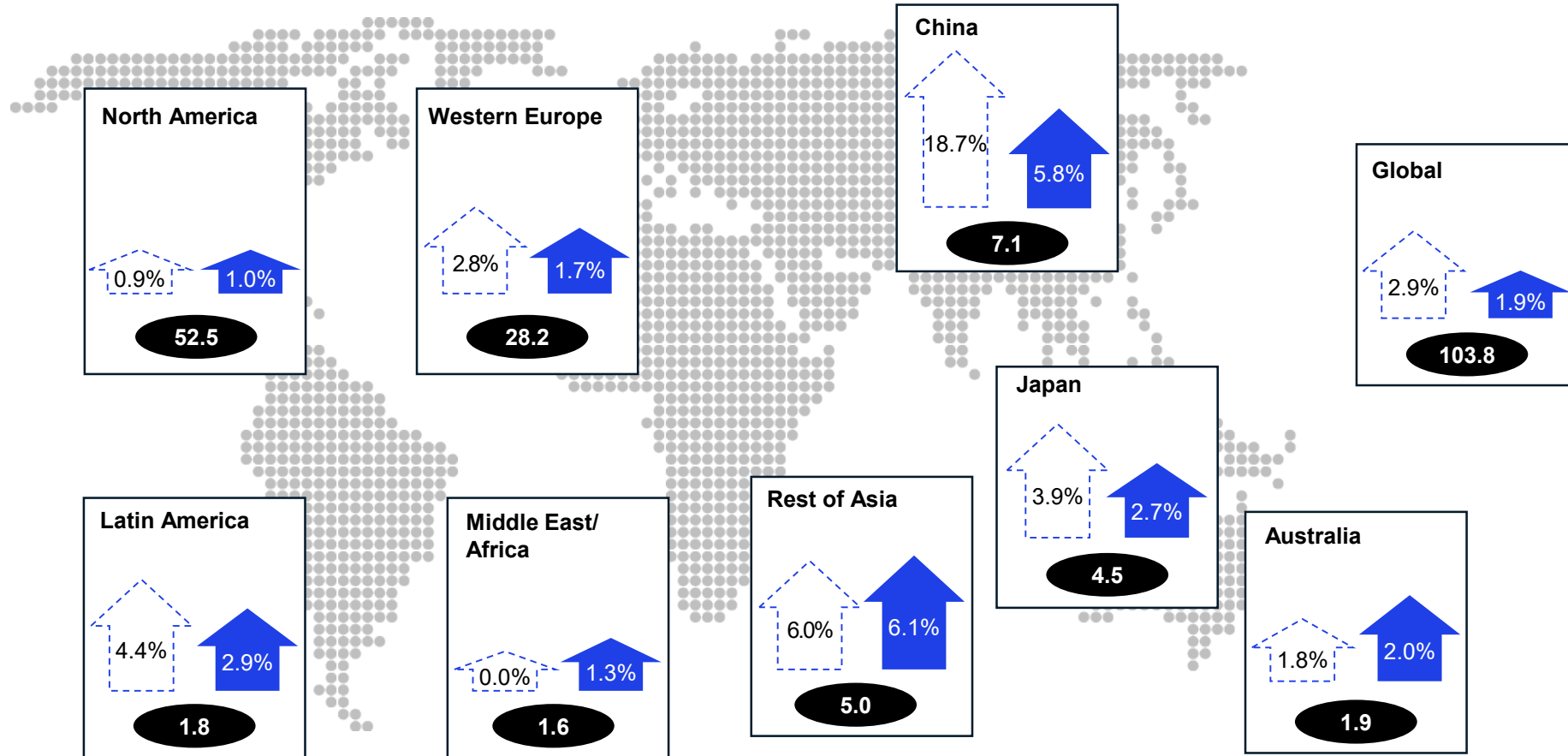


1. Includes Latin America, Middle East, and Africa

Global organic growth is expected to decline to ~2% p.a. for the next 5 years

x 2015-19E net flows, % CAGR
 ↑ 2020-24P net flows, % CAGR
 ● 2019 AuM, USD trillions

5-year annualized net flow effect by region^{1,2}



1. Includes 41 countries from North America, Western Europe, CEE, GCC, Asia-Pacific, LatAm and Africa

2. Numbers have been rounded