



REUTERS/Eddie Keogh

# Hubbis Forum Singapore 2012 - Global Fund Movement And Asia Fund Trend

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Alexander Looijen  
Business Manager Asia Pacific ex Japan - Lipper

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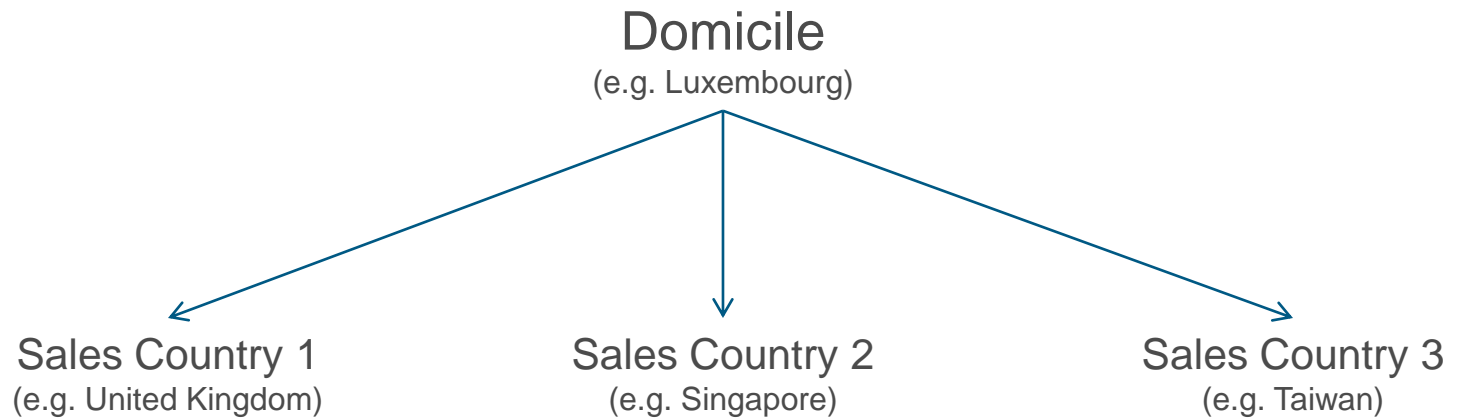


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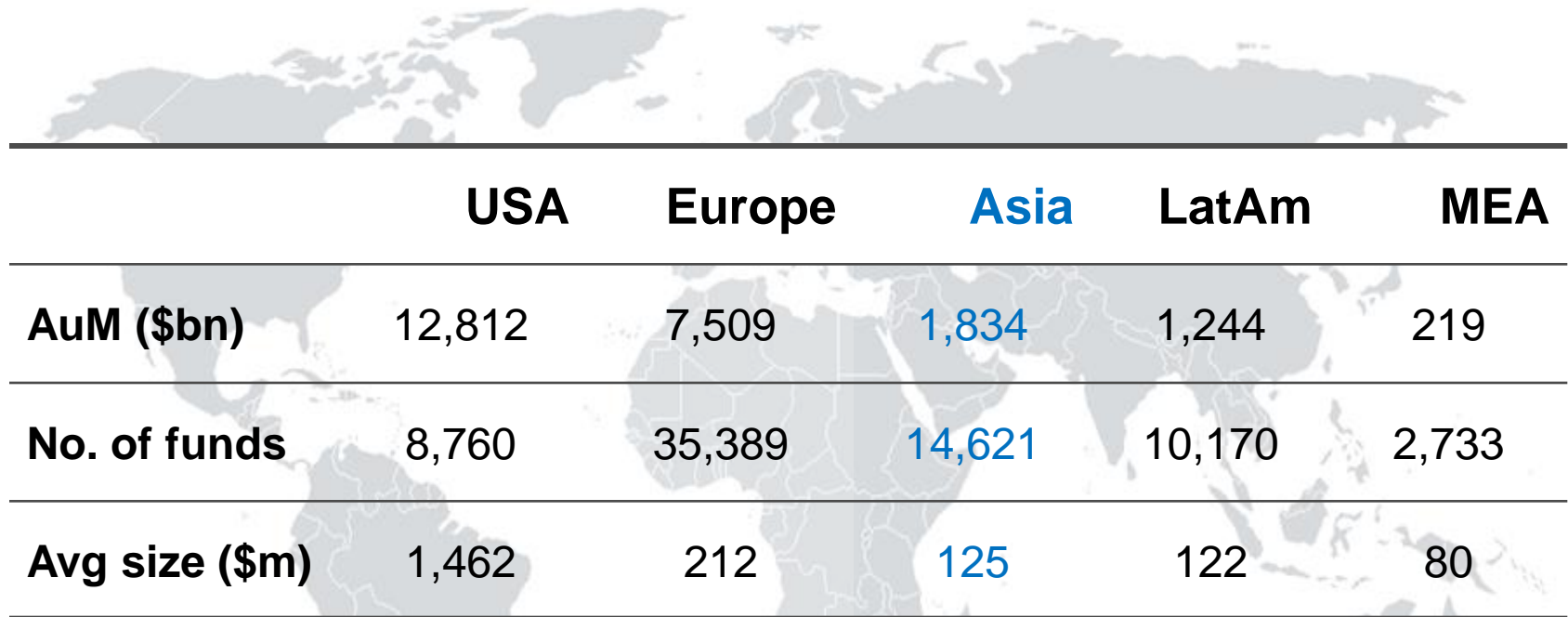
# Mutual Funds Flows

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Domicile = Sales Country  
(e.g. Malaysia)



# Global Fund Market Overview

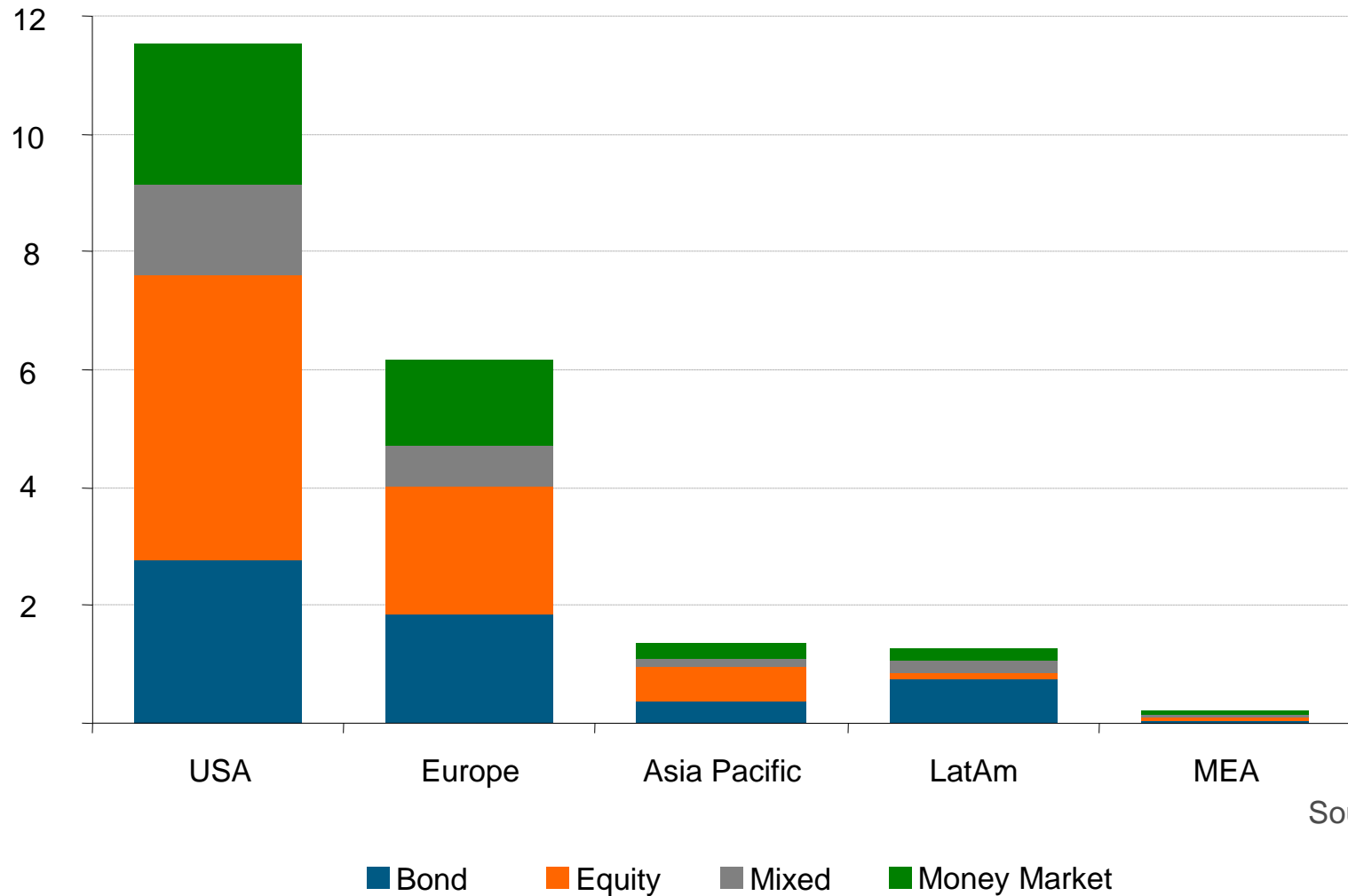


	USA	Europe	Asia	LatAm	MEA
<b>AuM (\$bn)</b>	12,812	7,509	1,834	1,244	219
<b>No. of funds</b>	8,760	35,389	14,621	10,170	2,733
<b>Avg size (\$m)</b>	1,462	212	125	122	80

Source Lipper - 30 June 2012

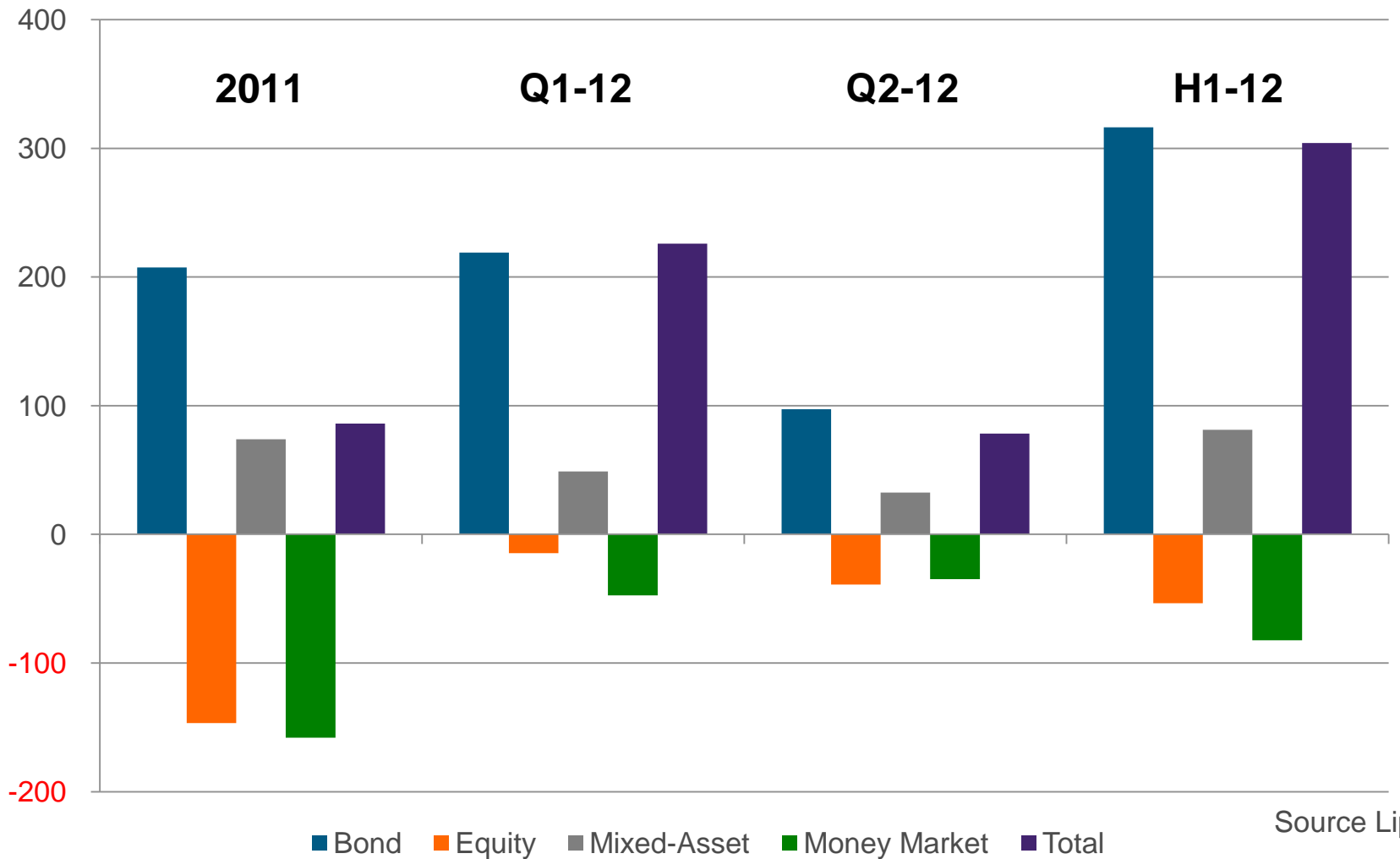
Mutual funds (including funds of funds) and ETFs

# Regional Asset Class Split



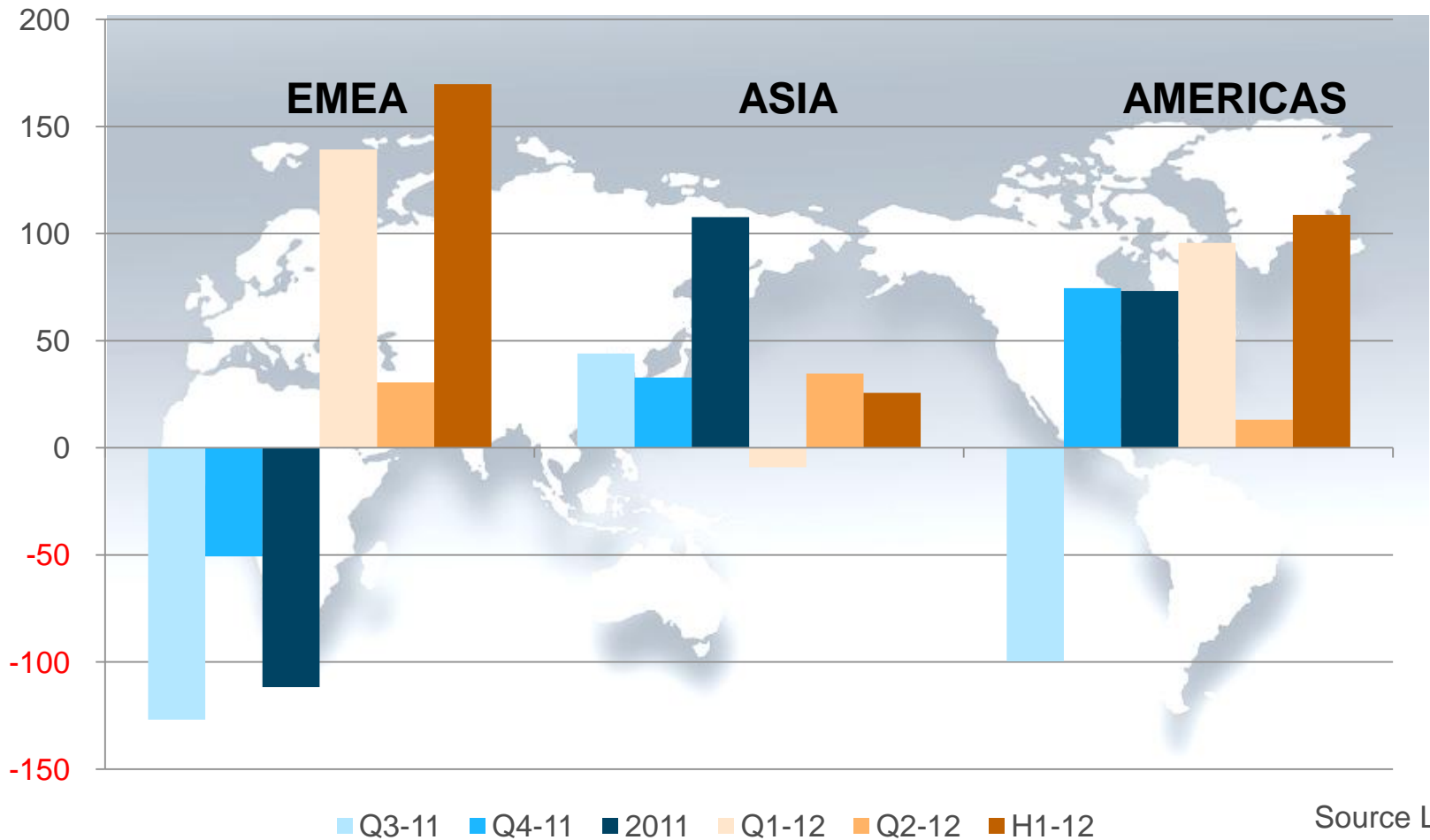
Source Lipper

# Global Funds Movements – asset type



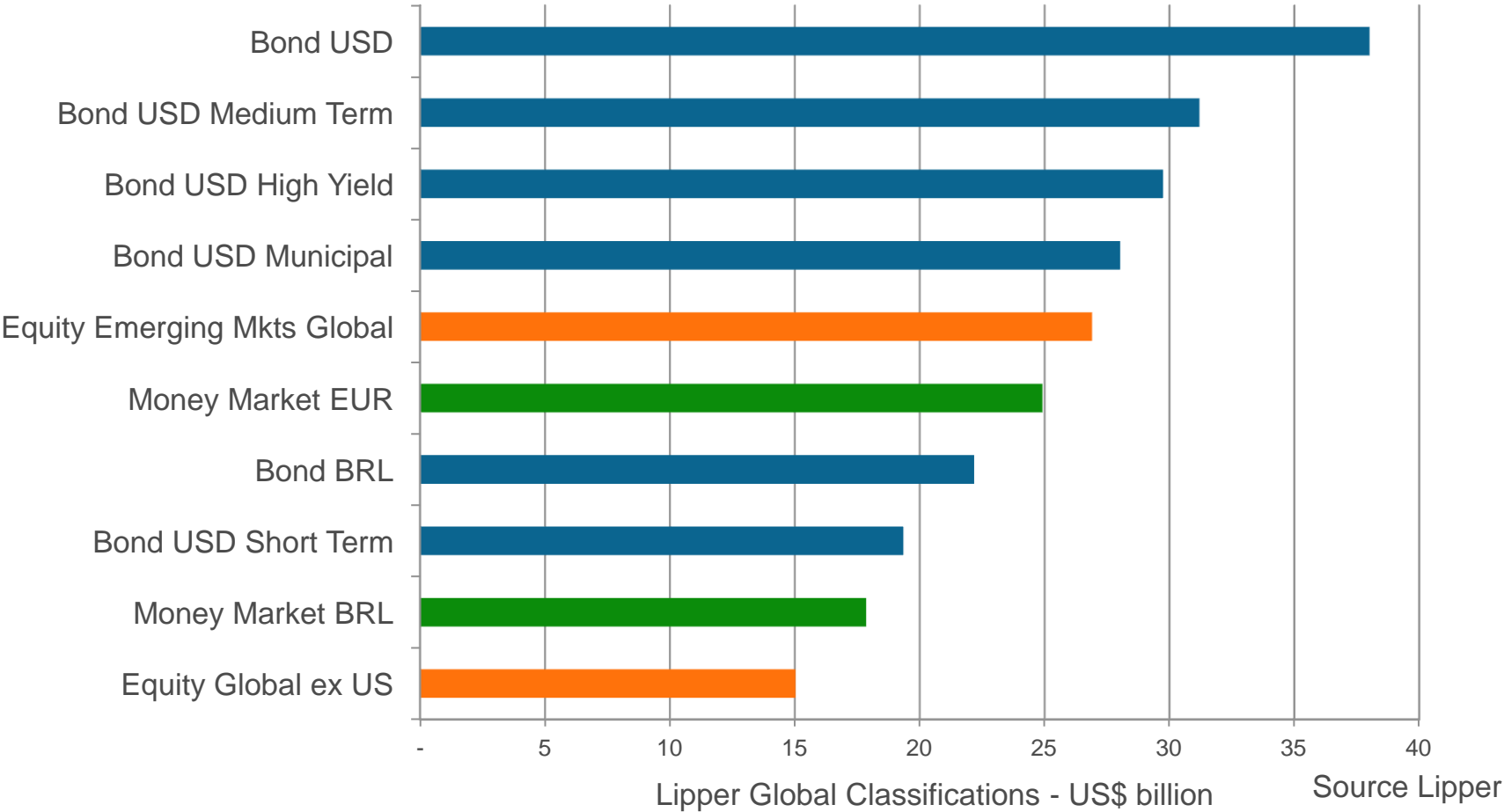
Mutual funds only, in US\$ billion as at 30 June 2012

# Global Fund Movements - region

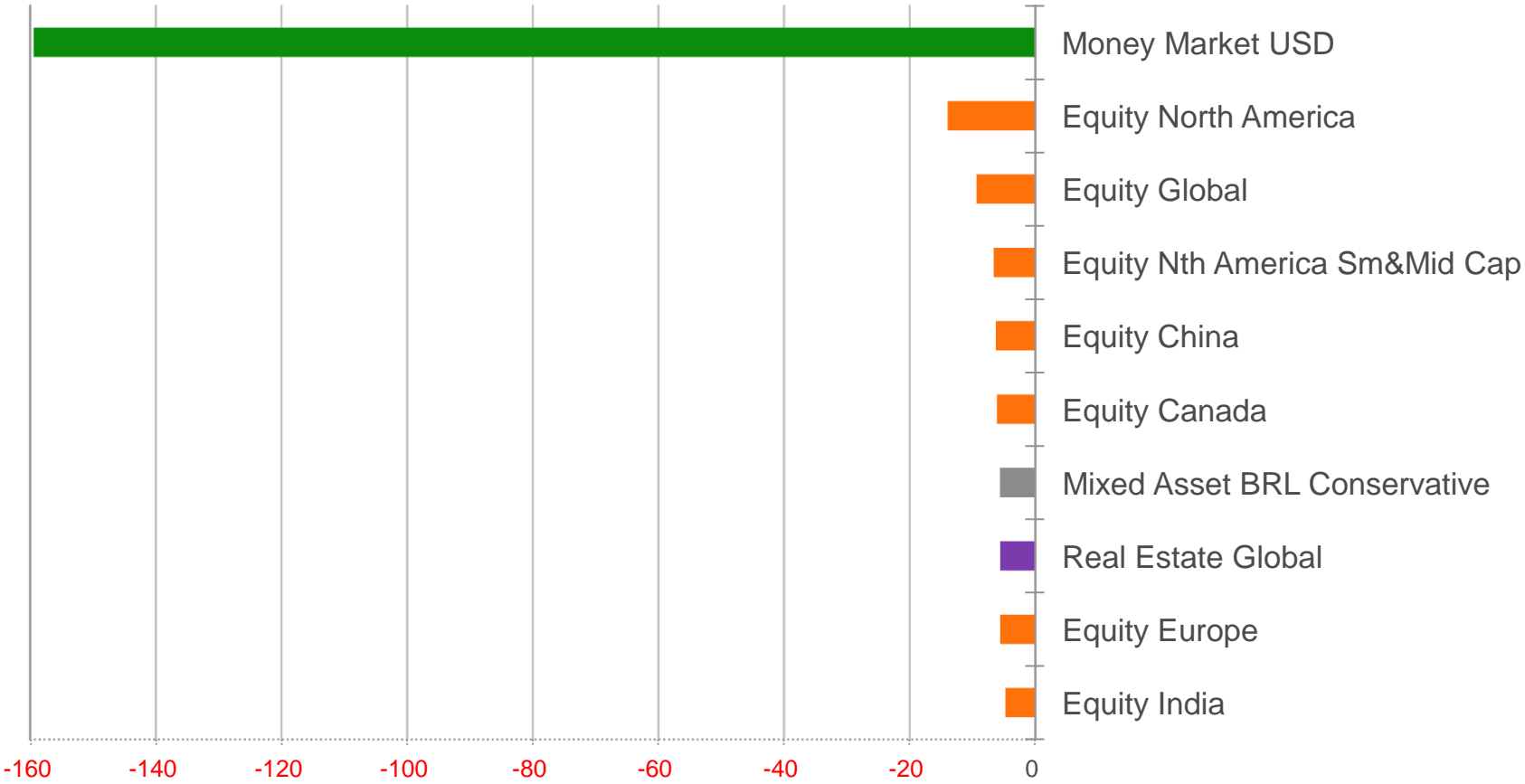


Mutual funds only, in US\$ billion as at 30 June 2012

# Top Global Fund Inflows H1-12



# Top Global Fund Outflows H1-12



Lipper Global Classifications - US\$ billion

Source Lipper





REUTERS/Mario Anzuoni

# Asia Key Fund Sales Trend

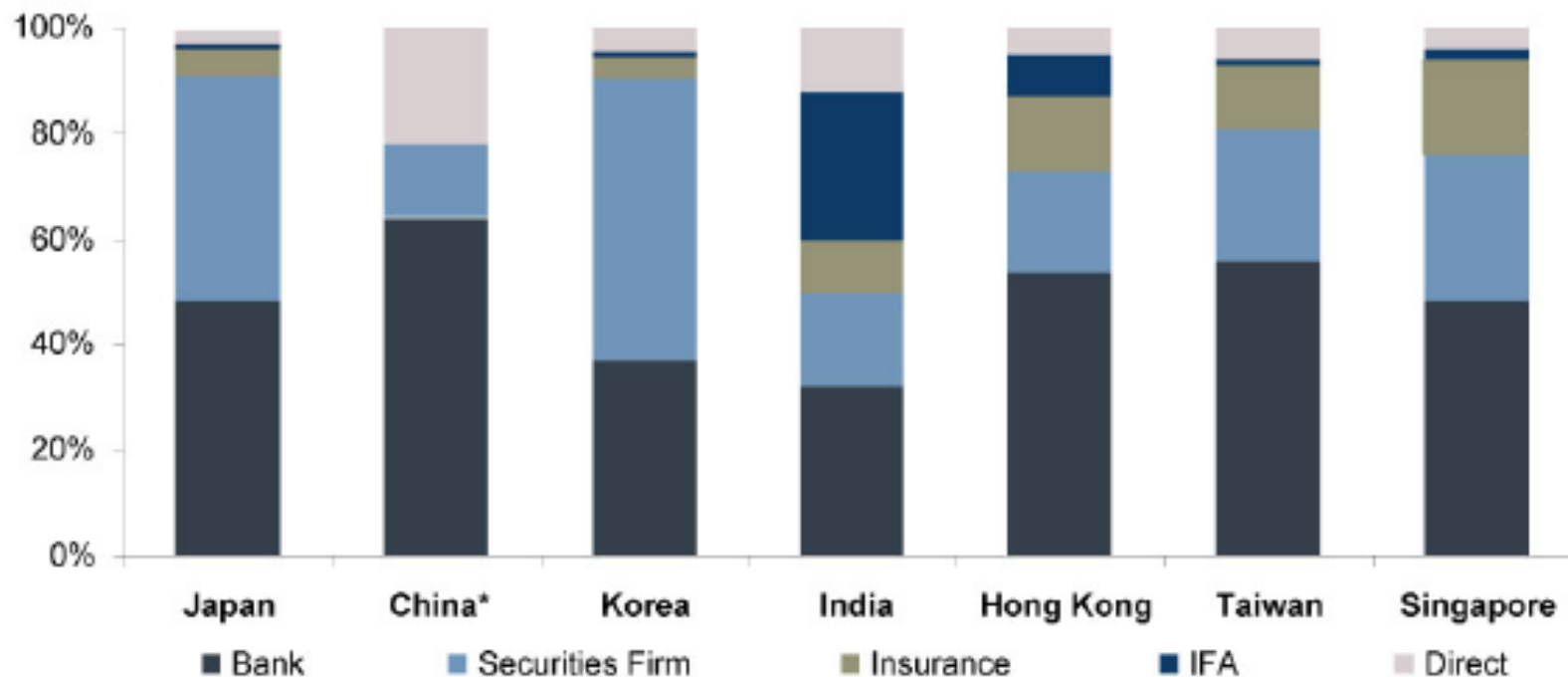
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# Distribution Channels in Asia



\*Please note: Insurance companies are not authorized to sell mutual funds in China; China has only recently approved allowing third-party financial institutions including IFAs and foreign firms to distribute funds.

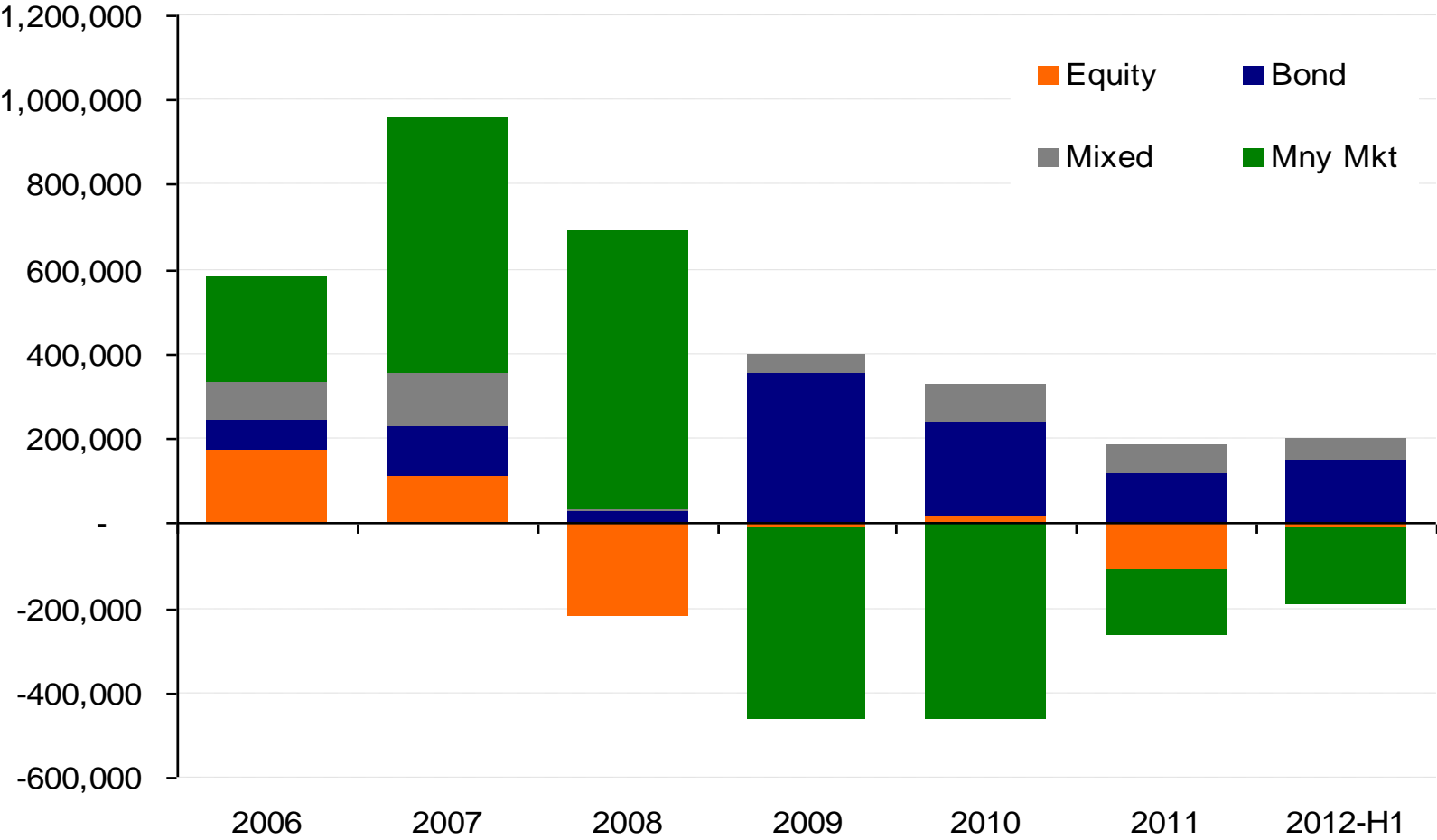
Source: Asian Industry Associations, NRI, Strategic Insight

## Asia's Fund Channels Trend

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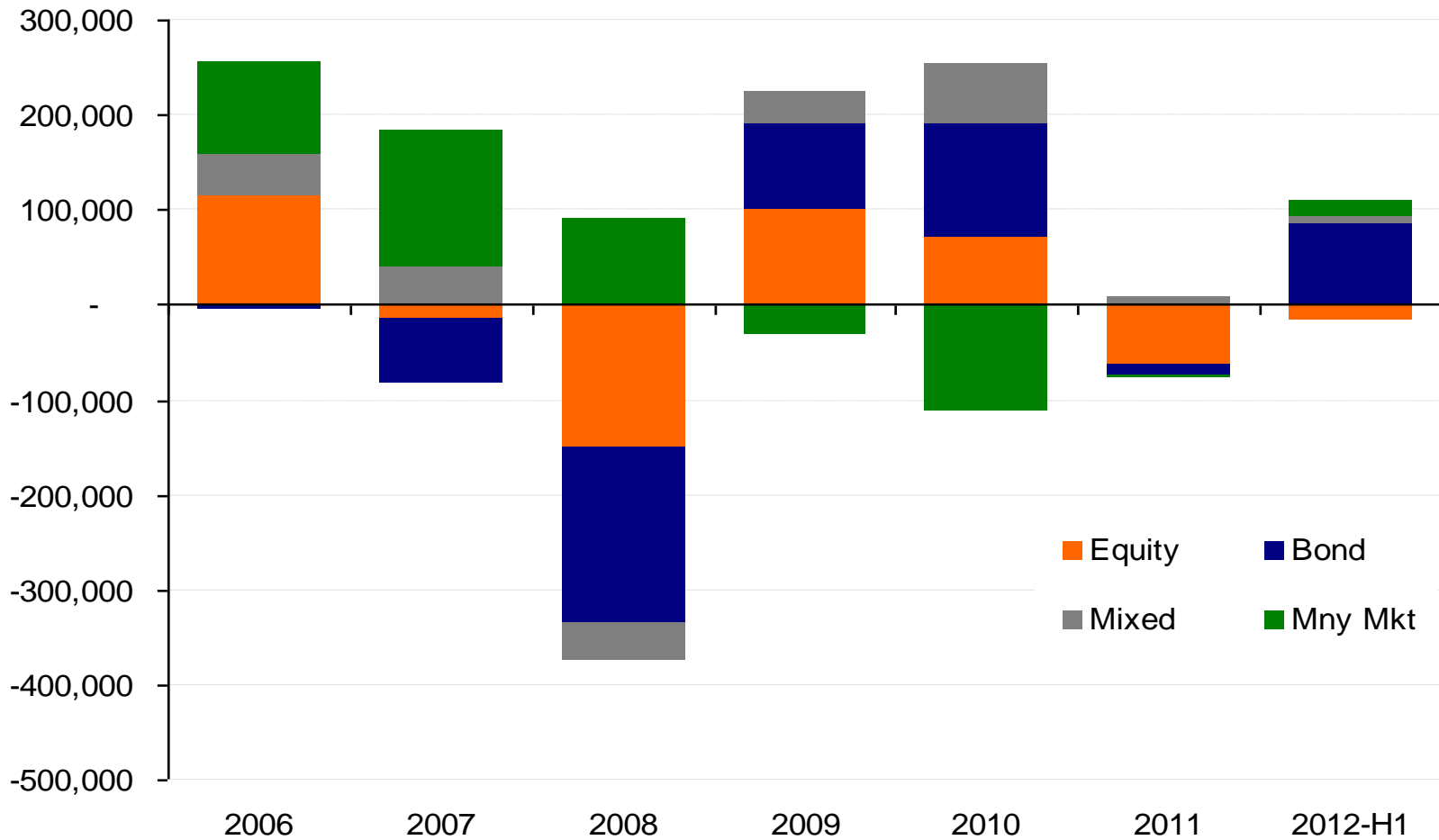
- Most of Asia is bank dominated, but securities houses grow after 2008, especially Japan and Korea.
- Cross-border products dominated Hong Kong, Taiwan and Singapore, where banks dominate, but also have a fairly diverse mix in other distribution channels.
- IFAs play a leading role in India, while first step has taken in China as well.
- 95% of cash concentrates to less than 1% of products, as distributors work with fewer managers and use fewer flagship products.

# US Sales Trends



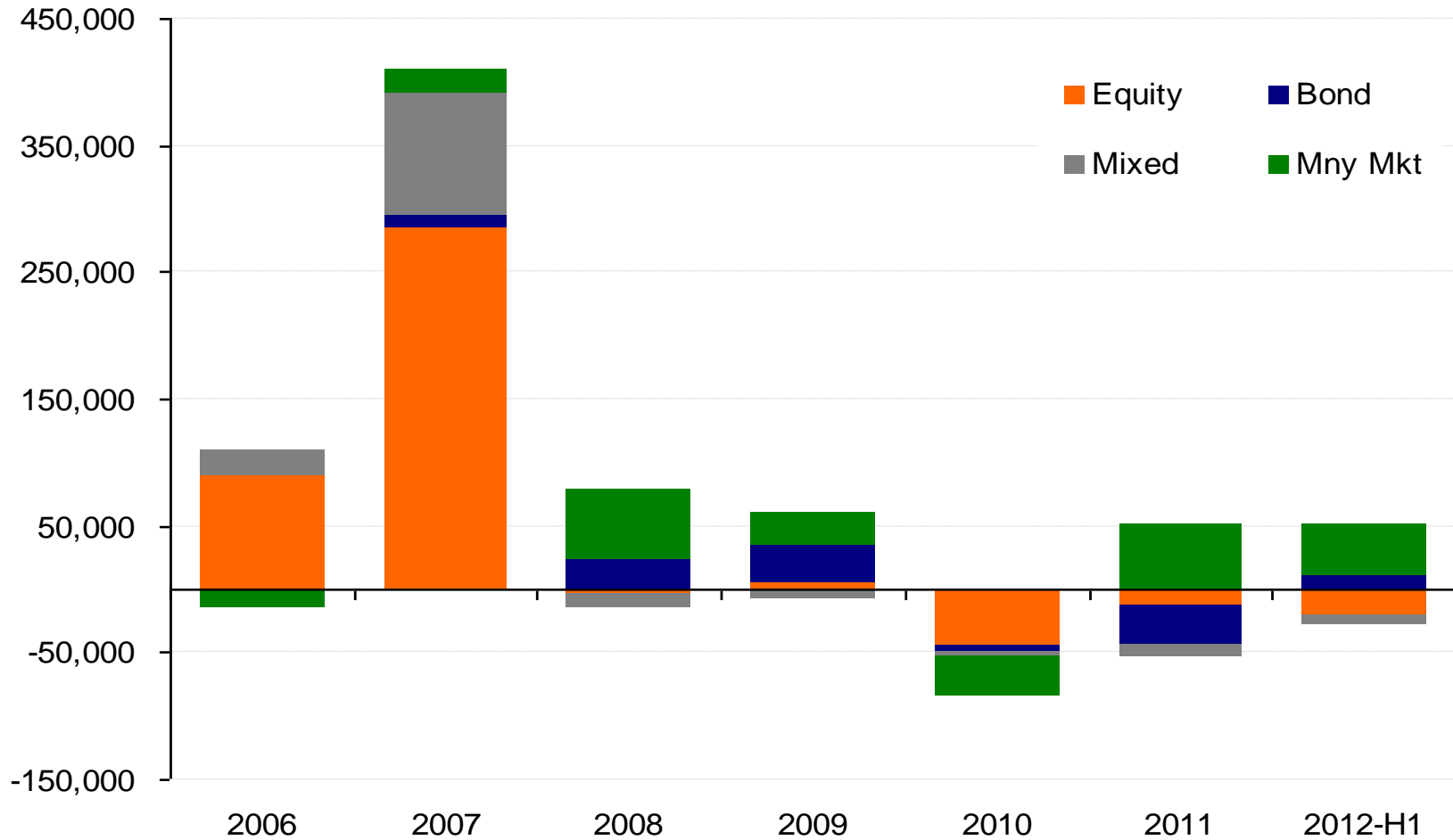
Source Lipper

# European Sales Trends



Source Lipper

# Asia Pacific sales trends



Source Lipper

Net sales in US\$ million. Locally domiciled mutual funds only

# UCITs Top Selling Markets in 2011

Top selling markets 2011	Gross Sales US\$M
Italy	91,976
Switzerland	66,183
Taiwan	51,409
Germany	49,995
Luxembourg	39,732
Spain	32,866
France	26,050
Hong Kong	23,298
United Kingdom	22,581
Belgium	12,923

Source Lipper

# Key Success Fund Products in Asia

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- Asia drives the worldwide fund industry and funds with regular cash dividend payout have become mainstream.
- Key success products in Asia: High Yield Bond Fund, REITs Fund, Double Decker Fund, Global Bond Fund, Asian Equity Fund



## Success Case Studies

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- Schroders in HK – Local to local & global to local partnerships (Asian Asset Income Fund with HSBC).
- PIMCO in JP – Driven by powerful brand around its thought leaders-Bill Gross & Mohamed El-Erian.
- Franklin Templeton – Global long-term investment campaigns and education.
- AllianceBernstein in TW – A big niche of High Yield, AllianceBernstein Global High Yield Bond Fund results in a 70% limitation for local investors in Taiwan.



Thank you

[Alexander.looijen@thomsonreuters.com](mailto:Alexander.looijen@thomsonreuters.com)

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