1. The total value of addressable institutional assets in APAC at the end of 2018 was US$9.3 trillion.

2. The bulk of outsourcing opportunities is found in three markets, namely Japan, China, and Australia with nearly 80% in collective market share.

3. There are two key winners in Q4, namely active equity quant as Australian DC pension piled into multi-factor strategies, and US passive fixed income with support from Japanese official institutions.

4. The biggest contributions to fundamental active flows are China asset manager/sub-advisory, South Korean institutions and Japanese asset manager/sub-advisory.

5. Demand for alternatives is on the rise despite rising concerns over valuations. Desire for higher yields and uncorrelated returns are driving a wide spectrum of investors to enter the fray.

6. Demand for multi-asset strategies in the alternatives space is rising as hedge funds are looking for a more consultative approach to allocate across a broad spectrum of assets from private equity to private debt, hedge funds, and real assets.

7. Hedge funds are seeing a resurgence in the region, shaking off their past reputation of volatility. Demand for global and even domestic hedge funds is on the rise, especially with the encouraging regulatory stances in markets like Japan, Korea, and China.

8. Passively built multi-asset funds have been at the receiving end of flows due to a heightened focus on fees.

9. Japan and Australia present the strongest asset gathering opportunities for passive fixed income.

10. Prediction: Whilst we believe cheap easily replicable third-party indices will drive volume, there is room for asset managers to distinguish themselves if they are able to build their corporate identity around ESG credentials.

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