**Asia Pacific Money in Motion**

**Q4 2018 Quarterly Trend Report**

**TOP 10 INSIGHTS**

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

2. **To build out outsourcing opportunities is found in these markets: notably Japan, China and Australia with nearly 80% in collective market share.**

3. **There are key winning sectors in Q4, namely active equity and bond asset classes.**

4. **The largest contributions to fundamentals active flows are Chinese asset management, Australian institutions and Japanese asset management.**

5. **Demand for alternatives is on the rise despite rising concerns over valuations.**

6. **Our rising demand for multi-asset strategies in the alternatives space where managers take a cost-efficient approach to allocate across a broad spectrum of assets from private equity to private debt, hedge funds and real estate.**

7. **Hedge funds are seeing a resurgence in the region, shaking off their bad reputation of yesteryear.**

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. **We see rising demand for multi-asset strategies in the alternatives space where managers take a consultative approach to allocate across a broad spectrum of assets from private equity to private debt, hedge funds and real estate.**

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