

# Wealth in Canada Market 2017 Share, Trend, Segmentation and Forecast to 2020

*Wealth in Canada Market Opportunity  
2017 Forecast to 2022*

PUNE, INDIA, March 21, 2017

/EINPresswire.com/ -- Summary

With the commodities market bust behind it the Canadian wealth market has grown faster than normal, with capital appreciation in mutual funds and equities driving the bounce. However, rapid growth will elude Canada as a tepid recovery in oil and gas along with substantial household debt loads will see slower growth over the rest of the forecast period.



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[Wealth in Canada](#): Sizing the Market Opportunity 2017 analyzes the Canadian wealth and retail savings and investments markets, with a focus on the HNW segment. The report is based on our proprietary datasets.

Specifically the report -

- Sizes the affluent market (both by number of individuals and the value of their liquid assets) using our proprietary datasets.
- Analyzes which asset classes are favored by Canadian investors and how their preferences impact the growth of the total savings and investments market.
- Examines HNW clients' attitudes towards non-traditional investments, such as property and commodities.
- Identifies key drivers and booking centers for offshore investments.
- Examines the tax landscape in Canada and future implications for investors.

Scope

- The affluent population in Canada will consistently expand over the forecast period, with growth strongest among the \$10m+ category.
- Over half of onshore liquid retail savings and investments is in the hands of mass affluents, and is thus exposed to credit risk, as these investors have often taken on considerable mortgage debt in Canada's heated major cities.
- After dragging down growth in retail wealth in 2015, equity assets boosted growth in 2016 along with mutual funds, although this will not persist.
- While Canadians do not offshore substantial portions of their wealth, investing in China is attractive - unsurprising given Canada's strong links to the country.

#### Reasons to buy

- Benchmark your share of the Canadian wealth market against the current market size.
- Forecast your future growth prospects using our projections for the market to 2020.
- Identify your most promising client segment by analyzing penetration of affluent individuals in Canada.
- Evaluate your HNW proposition by understanding how the Canadian tax system impacts HNW clients.
- Review your offshore strategy by identifying HNW motivations for offshore investments and their preferred booking centers.

#### Table of Content: Key Points

##### EXECUTIVE SUMMARY

1.1. The Canadian wealth market remains highly appealing

1.2. Key findings

1.3. Critical success factors

##### 2 SIZING AND FORECASTING THE CANADIAN WEALTH MARKET

2.1. Affluent individuals in Canada account for roughly 30% of the adult population

2.1.1. Increasingly favorable domestic conditions will drive further expansion in onshore wealth

2.1.2. Growth in the number of HNW individuals will be strongest among those with more than \$10m in assets

2.2. The bulk of Canada's onshore assets are concentrated in the hands of the mass affluent

2.2.1. Affluent assets are forecast to grow at a faster clip than the broader market

2.2.2. HNW portfolios above \$10m in AUM will experience the highest growth

##### 3 DRIVERS OF GROWTH IN THE CANADIAN WEALTH MARKET

3.1. Growth picked up in 2016 and will average 5.3% going forward

3.1.1. Lower TFSA limits will only modestly affect the growth of the overall retail investments market

3.1.2. Deposits and mutual funds form the bulk of the retail wealth market

3.1.3. Equities will provide some much-needed firepower behind the retail investment market value growth over the next year

3.2. Deposit growth will remain moderate as interest rates languish near zero

3.2.1. As cautious investors, Canadians have been drawn to solid bank accounts and other cash

products

3.2.2. Interest rates will ensure deposit growth remains modest

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Norah Trent

wiseguyreports

+1 646 845 9349 / +44 208 133 9349

[email us here](#)

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