Winning institutional investor market share: From asset manager to strategic partner

Crisil Coalition Greenwich

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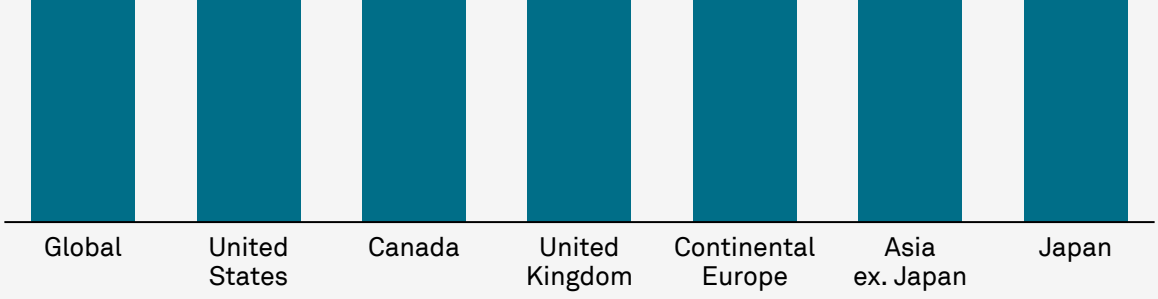
From asset classes to... integrated solutions

The **opportunity is shifting** from winning allocations to individual asset classes to **becoming a provider of integrated solutions** aligned to **specific investor objectives**

- Income and cash flow generation
- Retirement outcomes
- Liability and balance sheet management
- Capital efficiency
- Portfolio resilience
- Governance simplification

60% of institutional investors globally employ asset managers considered strategic partners. Managers that attain "strategic partner" status gain access to a large proportion of assets that are increasingly concentrated among a small number of trusted partners.

Proportion of assets managed by strategic partners*



Note: *Among investors who utilize strategic partners.
Source: Coalition Greenwich Voice of Client – 2026 Global Institutional Investors Study

Implications for winning asset managers

1. **Focus on truly differentiated products and prune other strategies**
2. **Continue to move to integrated client solutions (where aligned to corporate strategy)**
3. **Ensure the client experience is meeting higher industry quality standards**
4. **Understand how managers become strategic partners and execute rigorously**

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