Mutual Fund Management

Description: Brief Excerpt from Industry Overview Chapter:

Companies in this industry manage mutual funds and other portfolio assets of others on a fee or commission basis. Major companies include Fidelity Investments, Legg Mason, T Rowe Price, and Vanguard (all based in the US), as well as Investec (South Africa), Old Mutual (UK), and Schroders (UK).

Mutual funds worldwide have about $33 trillion in assets under management. The US has the largest mutual fund market in the world, accounting for about 50% of assets. Europe accounts for about 30% of mutual fund assets, and Africa and the Asia/Pacific region together account for about 10%, according to the Investment Company Institute.

The US mutual fund management industry includes about 850 companies with about $16 trillion in assets under management, according to the Investment Company Institute.

Competitive Landscape

Demand is affected by the global economic conditions, evolving investment preferences, and demographic trends. The profitability of individual companies depends on investment expertise and effective marketing. Large companies have economies of scale in operations and marketing. Small companies can compete effectively by specializing in desirable sectors and by producing higher investment returns. The US mutual fund industry is concentrated: the 10 largest firms manage more than half of total assets, according to the Investment Company Institute.

Products, Operations & Technology

Major services include the initial formation of a mutual fund, sales and redemption of shares, investment advisory services, and day-to-day management.

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