

# Balanced Funds Market to Reach \$25.5 Trillion By 2031 at 16.8% CAGR: Charles Schwab, Tata Mutual Fund, Citigroup

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NEW CASTLE, DE, UNITED STATES, March 4, 2025 /EINPresswire.com/ -- Allied Market Research published a report, titled, "[Balanced Funds Market](#) By Investor Type (Institutional and Individual) and Distribution Channel (Banks, Financial Advisors/Brokers, Direct Sellers, and Others): Global Opportunity Analysis and Industry Forecast, 2022–2031". According to the report, the global balanced funds industry generated \$5,545.89 billion in 2021, and is anticipated to generate \$25,499.0 billion by 2031, witnessing a CAGR of 16.8% from 2022 to 2031.

## Prime determinants of growth

Balanced funds have lower total expense ratios (ERs), can automatically spread an investor's money across variety of stocks, and allow investors to withdraw money periodically without upsetting the asset allocation. These factors drive the growth of the global balanced funds market. However, investors cannot use a bond laddering strategy for buying bonds with staggered maturity dates to adjust cash flows and repayment of principal according to their financial situation. This, in turn, restricts the market growth. On the other hand, rise in number of first-time investors, who do not have much knowledge about investing in the equity market and are usually averse to high risks, is expected to offer remunerative opportunities for the expansion of the global market.

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The institutional segment to maintain its leadership status throughout the forecast period

Based on investor type, the institutional segment held the highest market share in 2021, accounting for nearly three-fourths of the global balanced funds market, and is estimated to maintain its leadership status throughout the forecast period. It is due to the fact that Institutional investors have the resources and specialized knowledge to thoroughly examine a wide range of investment options that individual investors do not have access to. However, the individual segment is projected to manifest the highest CAGR of 20.0% from 2022 to 2031, owing to a surge in the use of mobile and digital investment platforms, as investors in underdeveloped

countries seek new sources of income.

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The financial advisors/brokers segment to maintain its lead position during the forecast period

Based on distribution channel, the financial advisors/brokers segment accounted for the largest share in 2021, contributing to nearly half of the global balanced funds market, and is projected to maintain its lead position during the forecast period. Increase in investment in balanced funds through brokers is boosting the growth of the segment. However, the direct sellers segment is expected to portray the largest CAGR of 19.7% from 2022 to 2031, due to increase in awareness about the mutual fund concept among people.

North America to maintain its dominance by 2031

Based on region, North America held the highest market share in terms of revenue 2021, accounting for nearly half of the global balanced funds market, owing to initiatives by key players to support the start-ups. However, the Asia-Pacific region is expected to witness the fastest CAGR of 21.4% from 2022 to 2031. This is attributed to increase in awareness among customers as active savers and the percentage of their income spent on savings.

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Leading Market Players

Axis Mutual Fund

Canada Life Assurance Company

Citigroup Inc.

Charles Schwab

Goldman Sachs

JPMorgan Chase & Co.

Nippon Life India Asset Management Limited

Scotiabank

Tata Mutual Fund

The Vanguard Group, Inc.

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Pawan Kumar, the CEO of Allied Market Research, is leading the organization toward providing high-quality data and insights. We are in professional corporate relations with various companies and this helps us in digging out market data that helps us generate accurate research data tables and confirms utmost accuracy in our market forecasting. Each and every data presented in the reports published by us is extracted through primary interviews with top officials from leading companies of domain concerned. Our secondary data procurement methodology includes deep online and offline research and discussion with knowledgeable professionals and analysts in the industry.

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