

Call us to get started

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Market Intelligence Monitor

A service of Global Fund Distribution



pwc

Market Intelligence Monitor

The world of fund distribution at a glance



To get your trial access, call or email the coordination team

Market

- Change is ever constant. That's why you need:
- up-to-date market information to implement and maintain a successful cross-border distribution strategy, and
 - accurate information on changes before they happen and how they may impact your funds.

Intelligence

Our local experts can help you monitor and interpret the impact that local developments may have on your cross-border fund business. Our Market Intelligence Monitor provides you with constant online access to valuable information to launch marketing in target markets as well as staying abreast of important local changes to modify your strategy.

Monitor

On top of country specific information under constant update, you will also receive:

- news flash alerts,
- regular PwC views on the market, and
- easy-to-use quarterly summaries of all key changes.

The Market Intelligence Monitor is a user friendly resource covering multiple jurisdictions and adding value to your business by supporting your marketing, product development and compliance teams.

Key areas covered

Our Market Intelligence Monitor service currently covers seven key areas, important to the cross border distribution of UCITS funds.

You need more information?

Visit our website: www.fundmarketintelligence.com or call directly your MIM contact.

Distribution process

Details on the market entry options which are available for different products and target investors, the current best market practices, the types of local entities needed to support the distribution of authorised products, details of local distributors, etc.

Operational issues

The various operational processes and issues a fund needs to consider when seeking to distribute to local investors, i.e. the use of nominee accounts, AML and KYC requirements.

Regulatory reporting

The regulatory frameworks governing fund distribution, changes to these frameworks, the ongoing regulatory obligations and/or market practices of the fund in relation to maintaining authorisation for distribution, maintenance fees payable, publication requirements, etc.

Market features

A comprehensive overview of each local IM market including types of products distributed, local actors, market statistics including size, net sales, assets, regulators and association links, etc.

Marketing rules

The use and content of marketing documents and marketing instruments/media, i.e. cold calling, Internet and TV commercials. Details of the rules, regulations and market practices surrounding the marketing of investment funds.

Product analysis

A clear picture of the type of fund structures currently distributed, new products on the market including their key features, current investor preferences and the key drivers of changes impacting fund design.

Taxation

Details of the various tax obligations on the product, the taxation treatment of local investors as well as the requirements related to the reporting of fiscal data to the authorities, changes to taxation provisions and the actual or potential impact on the product and/or local investors.

