



Process Based Capital Markets BPO Market Assessment and Forecast

Market Analysis
Abstract

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Who Is This Report For?

NelsonHall's "Process-Based Capital Markets BPO Market Assessment and Forecast" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the capital markets and banking industry
- Vendor marketing, sales and business managers developing strategies to target service opportunities within the capital markets and banking industry
- Financial analysts and investors specializing in the capital markets and banking sector.

Scope of the Report

The report analyzes the global market for process-based capital markets BPO services and addresses the following questions:

- What is the current and future market for process-based capital markets BPO services?
- What is the size and growth of the process-based capital markets BPO market by market segment?
- Within process-based capital markets BPO services, which processes are emerging strongly?
- What are the market segments for process-based capital markets BPO services and their characteristics? What are the drivers, benefits, and inhibitors for each segment? What are vendor capabilities by segment?
- What technologies and platforms are being utilized and what are the implications by market segment?
- What are vendor challenges and critical success factors by market segment?
- How are vendors positioned within each process-based capital markets BPO market segment?
- Additional topics include: contract lengths; pricing models; partnerships; acquisitions; delivery center locations and the use of offshoring; vendor targeting by client size, geography, and industry.



Key Findings & Highlights

The process-based capital markets BPO market continues to grow as organizations seek to cut their cost of operations, improve cash flow, reduce revenue leakage, improve customer satisfaction and respond more agilely to market conditions.

The process-based capital markets BPO market is an important sub-segment of the \$46bn capital markets BPO market.

The process-based capital markets BPO market remains dominated by the U.S., which accounts for ~41% of client spend. Back office CM BPO (portfolio management services) remains the largest sector.

The process-based capital markets BPO market is well established, with examples of client relationships running ~10 years in duration.

Service providers currently support the operations of some of the largest universal banks and custodians. Increasingly, asset managers such as hedge funds, private equity firms and ETFs are becoming clients, due to a lack of resources to support a comprehensive operations environment.

Cost take out through labor arbitrage remains a key driver behind the decision to outsource, and service providers now support clients from a wide variety of low cost near and offshore delivery centers in order to achieve this. Offshore delivery remains the prime driver of cost.

Process-based capital markets BPO providers are typically targeting two separate groups of clients:

- large multinational or national organizations with assets >\$100bn and >10k employees
- asset and wealth managers of any size (typically much smaller than the first group listed above).

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1. Changing Shape of Process Based Capital Markets BPO Services

 2. Buy-side Requirements

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 4. Vendor Market Shares

 5. Vendor Offerings & Targeting

 6. Vendor Challenges and Success Factors

 7. Appendix A: Service Definitions

 8. Appendix B: Vendor Details

Vendors Profiled

Vendors interviewed and profiled include:

- Cognizant
- EXL
- Genpact
- HCL
- iGate
- Infosys
- Mphasis
- Syntel
- TCS
- Wipro

Report Length

82 pages, consisting of 6 chapters and 2 Appendices

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