

Capital Markets Disrupted – The Quest for More Continues Despite COVID-19

August 2020: Complimentary Abstract / Table of Contents



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- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background of the research

The landscape for capital markets operations is becoming increasingly competitive as enterprises continue to look for newer solutions to improve their capabilities, expand their footprint and gain market share. A shift in consumer behavior, complex operations, and increased interdependencies demand newer product and service offerings driven by efficient and effective operations and processes. The rise of digital elements such as Artificial Intelligence (AI), advanced analytics, Machine Learning (ML), and cognitive incorporated in the technology offerings, are playing a major role in shaping the current landscape of the capital markets operations. The winners of the industry would be those who can quickly adapt themselves to these emerging themes which has the potential to disrupt the entire value chain.

Service providers, with presence across different Lines of Businesses (LOBs), have started focusing on providing end-to-end solutions to their clients. More and more financial services players are taking the route of collaboration and partnerships to catalyze growth. COVID-19 is also expected to have a high impact on the market, resulting from changes in customer behavior. Enterprises need to ramp up their efforts to implement concrete measures and compete effectively in this market. Given these factors, the role of outsourcing service providers in the industry is further evolving. They can help enterprises in responding to these changes and move faster without taking undue risks.

Scope of this report:



Geography
Global



Service providers
20+ leading capital markets
services providers



Services
Business Process
Services

Overview and abbreviated summary of key messages

This report examines the increasingly competitive landscape of capital markets operations. It focuses on key themes governing its different value chain segments and emerging service provider trends, along with identifying key implications of the global pandemic for buyers and service providers.

Some of the findings in this report, among others, are:

Changing landscape of capital markets

- The capital markets industry has shown steady growth, and is now on the verge of disruption, but with significant disparities among its different segments – buy side, sell side, and market infrastructure
- The changing business landscape is, therefore, forcing all its segments, to rethink their business models to achieve customer-centric growth empowered by state-of-the art infrastructure and processes
- Diversification beyond the historical leadership segments, consolidation of smaller players, and collaboration with FinTechs, may help strengthen offerings across regions, sectors, and asset classes

Outsourcing trends in capital markets operations

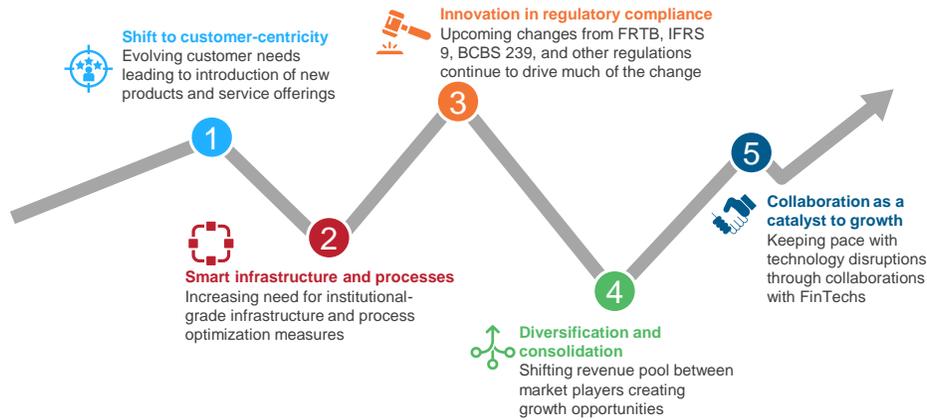
- Outsourcing trends in the industry show an encouraging picture with steady growth, driven by both new signups and scope expansion of the existing deals
- Service providers are witnessing increase in number of new deals from larger players and emerging geographies coupled with higher inclusion of digital capabilities in upcoming contracts

Impact of COVID-19

- With the advent of COVID-19, the industry has observed a unique combination of both demand and supply-side volatility, and it must act soon before the health crisis turns into a financial one
- The pandemic may disturb market shares in the short term, while in the long run, players that can best adapt their business model to the changing needs and preferences will seize the day

This study offers three distinct chapters providing a deep dive into key aspects of capital markets; below are four charts to illustrate the depth of the report

Key emerging themes governing the capital markets industry



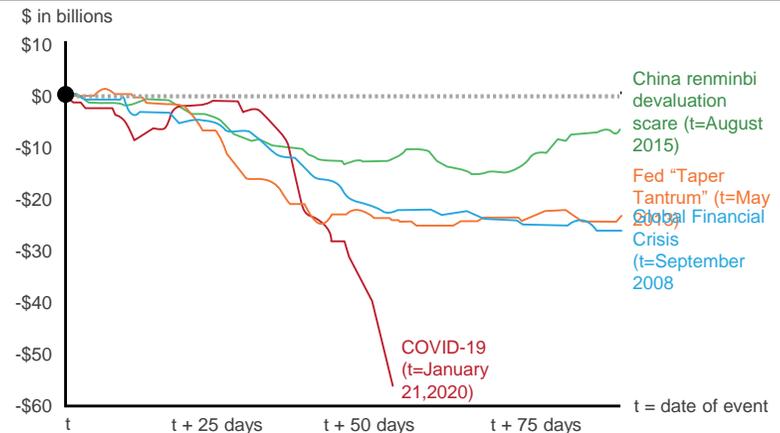
Size and growth of capital markets operations



Move towards adoption of integrated digital solutions



Impact of COVID-19 on capital flows to emerging economies



Research calendar

Banking & Financial Services BPS

Published Planned Current release

Flagship BFS BPO reports

Release date

Financial Crime and Compliance (FCC) Operations Services PEAK Matrix® Assessment and Service Provider Landscape 2020

October 2019

Capital Markets Operations – Service Provider Landscape with Services PEAK Matrix® Assessment 2020

November 2019

Capital Markets Operations – Service Provider Profile Compendium 2020

December 2019

Wealth Management Operations – Service Provider Landscape with Services PEAK Matrix® Assessment 2020

March 2020

The Amazing Race – Payments Edition 2020

June 2020

Capital Markets Disrupted – The Quest for More Continues Despite COVID-19

August 2020

Mortgage Operations – Service Provider Landscape with Services PEAK Matrix® Assessment 2020

Q3 2020

Payments Service Provider Landscape

Q4 2020

Thematic BFS BPO reports

Release date

Wealth Management for the Next Generation

February 2018

Broking Bad – Newer models that brokers need to adopt

March 2018

Deal or No Deal – How Real is Digital Adoption in Banks' Sourcing Relationships

August 2019

Business-Process-as-a-Service (BPaaS) Adoption Debunked – Current and Future Direction

September 2019

The Customer Satisfaction Conundrum – Pain points in Wealth management and How to Solve for these

Q3 2020

Achieve the Most Out of Our Analytics Spend – Analytics Success Stories in BFS

Q3 2020

Evolution of transition, engagement, and governance models in BPS

Q4 2020

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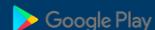
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