

For Immediate Release

## Brookfield Oaktree Wealth Solutions Survey Reveals Strong Demand for Alternative Investments Among High-Net-Worth Investors in Asia Pacific

*New data from “The Alts Institute” provides key findings from investors in Hong Kong, Singapore and Taiwan on investing in alternatives and their financial advisor’s role*

**NEW YORK – October 8, 2024** – [Brookfield Oaktree Wealth Solutions](#), a leading provider of alternative investments to financial advisors and their clients globally, today revealed [key findings](#) from its new survey of individual high-net-worth (“HNW”) investors in Asia Pacific. Conducted by independent research firm [CoreData Research](#), “The Alts Institute” [Alternative Investing Survey](#) surveyed HNW investors in Hong Kong, Singapore and Taiwan with at least US \$2.5 million in household investable assets to better understand their distinct attitudes and beliefs around alternative investments (“alts”) and the attending conversations with their financial professional. This survey is part of a broader, intercontinental research initiative which includes findings from HNW investors and advisors in the U.S. and Canada.

### Key findings among HNW investors in Asia:

- *Those who are already invested in alternatives want more and view their financial professional as a partner in their alts journey:*
  - 87% of alts users are open to investing more into alternatives.
  - 85% of alts users would like to invest in a greater variety of investments beyond what they already own.
  - 44% of alts users would be comfortable with a 25%-plus allocation to alts.
  - 85% of alts users believe that having an alternatives allocation will drive stronger long-term outcomes than a traditional portfolio.
  - 88% of investors in Asia want their financial professional to speak to them more about alts.
  - 87% of investors in Asia trust their financial professional to make the right decisions on alts, but still want to understand what they are invested in.
- *Those who are not invested in alternatives (yet) are very open to them:*
  - 83% would begin investing in alternatives if they better understood the available options.
  - 90% say they would begin investing in alternatives if their financial advisor recommended it.

### Key findings comparing HNW investor views in Asia and North America:

- 77% of investors in Asia have experience with alternatives, compared to 54% of investors in North America.
- Investors in Asia not using alternatives cite their lack of understanding as the most significant hurdle to investing in alternatives, while non-users in North America say the primary hurdle is their financial professional hasn’t discussed alternatives with them.
- 89% of investors in Asia do their own research on alternatives and discuss it with their financial professional, while 61% of investors in North America say the same.

- 62% of investors in Asia have moved or would consider moving to a new financial professional to better access high-quality alternatives, compared to 41% of investors in North America.

Jeremy Hall, Managing Director and Head of Asia Pacific for Brookfield Oaktree Wealth Solutions, said, “Asia Pacific is a strategically important region for Brookfield Oaktree Wealth Solutions and our proprietary research underscores the growing demand for alternatives from HNW investors, as well as the critical role that their financial professionals play. We look forward to leading the way with educational tools and research from The Alts Institute to help advisors serve as helpful guides to their clients, many of whom are looking to increase their exposure to a variety of alternatives.”

**The Alts Institute by Brookfield Oaktree Wealth Solutions** offers financial professionals a comprehensive platform that empowers them with client-friendly resources, advanced asset allocation strategies, and best practices to fully unlock the potential of alternative investments. Through in-depth research, The Alts Institute deepens its understanding of the alternatives market, aiming to better serve both financial professionals and investors. Additionally, it sheds light on current and emerging trends within the industry, making it an invaluable resource for staying ahead in the evolving investment landscape.

The Alts Institute also surveyed HNW investors and financial advisors in the U.S. and Canada on their views on alternatives, helping to illuminate best practices among advisors most effectively utilizing alternative investments. Find more insights on how North American [investors](#) and [advisors](#) view alternatives in respective links.

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### **About Brookfield Asset Management**

Brookfield Asset Management Ltd. (NYSE: BAM, TSX: BAM) is a leading global alternative asset manager with approximately \$1 trillion of assets under management across renewable power and transition, infrastructure, private equity, real estate, and credit. We invest client capital for the long-term with a focus on real assets and essential service businesses that form the backbone of the global economy. We offer a range of alternative investment products to investors around the world — including public and private pension plans, endowments and foundations, sovereign wealth funds, financial institutions, insurance companies and private wealth investors. We draw on Brookfield’s heritage as an owner and operator to invest for value and generate strong returns for our clients, across economic cycles.

For more information, please visit our website at <https://bam.brookfield.com>.

### **About Brookfield Oaktree Wealth Solutions**

Brookfield Oaktree Wealth Solutions is a leading provider of alternative investments to advisors and their clients globally, helping them meet their overall financial goals. The global scale and multi-decade track records of our parent companies, Brookfield and Oaktree, place us among the leaders in alternative investing. For more information, please visit our website at [www.brookfieldoaktree.com](http://www.brookfieldoaktree.com). Brookfield Oaktree Wealth Solutions is registered as a broker-dealer with the U.S. Securities & Exchange Commission (“SEC”) and is a member of Financial Industry Regulatory Authority, Inc.) (“[FINRA](#)”) and the Securities Investor Protection Corporation (“SIPC”).

Advisors interested in learning more about Brookfield Oaktree Wealth Solutions should call +1 (855) 777-8001 or email [info@brookfieldoaktree.com](mailto:info@brookfieldoaktree.com).

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