

### November 2009

#### Affluent Investing and Banking - UK

- The equivalent of 6.3 million UK individuals over the age of 21 falls into the target wealth market (those with investible assets of £50K or more). Only 1.4% of the adult population, however, report owning investible assets worth over £500K.
- The increasingly harsh tax treatment of wealthy UK ...

#### Eye on intermediaries - Savings and Investment - UK

Investors are clearly still nervous, despite the stock market rally. Half of IFAs surveyed by Mintel reported that clients were taking a more defensive approach to investments.

### October 2009

#### Sharedealing - UK

- Over 10 million consumers identify friends and family as an important source of investment related advice. Offering existing clients free trades or extra cash to refer new clients could help boost Sharedealing provider's revenues.
- Despite the progressive decline in the cost of trading it appears that costs need to be ...