



## What's New and What's Next for the ETF Market Globally.

**ETFGI**

Deborah Fuhr  
Managing Partner  
ETFGI  
deborah.fuhr@etfgi.com  
www.etfgi.com

register on our website for monthly press release

Twitter @deborahfuhr @ETFGI  
Linkedin Deborah Fuhr, ETF Network ETFGI Women in ETFs



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# What's New and What's Next for the ETF Market GlobalFs

## Current ETF landscape

- 2021 was a record
- 2022 was 2<sup>nd</sup> best year
- 2023 is looking good
- Watch regulatory changes

## Product trends

- Fixed income
- Active - regulatory changes, mutual fund, SMA conversions to ETFs
- ESG
- Crypto

## Distribution trends

- Retail, advisors
- Digital platforms, Model portfolios
- Institutions
- New markets - Europe, Latin America, Asia Pacific, Middle East, Africa

The future - regulations, product and distribution innovations will drive growth

## Current ETF landscape

**S**ETFs - Exchange Traded Funds - regulated funds with additional benefits of being listed and traded on exchanges, in-kind creation/redemption

Funds with added benefits - a wrapper - **not an asset class**

**ETPs** - Exchange Traded Products - products that are not ETFs typically have different, tax, regulatory and counterparty treatment

**33<sup>rd</sup>** anniversary of the listing of the first ETF “TIPs” in Canada March 9, 2023

**30<sup>th</sup>** anniversary for US the S&P 500 SPDR or SPY January 22, 2023

SPY is still the largest ETF

S&P 500 is the most popular ETF benchmark with \$1.13 trillion

**23<sup>rd</sup>** anniversary for LDRS Stoxx and Euro Stoxx ETFs April 11, 2023

## Current ETF landscape

2021 was a record year:

Net new assets \$1.3 trillion, year-end AUM \$10.3 trillion, 1,830 new listings

2022 was 2nd best year:

Net new assets \$759 billion, year-end AUM \$9.2 trillion, 1,609 new listings

Global mutual funds had net outflows of \$1.3 trillion

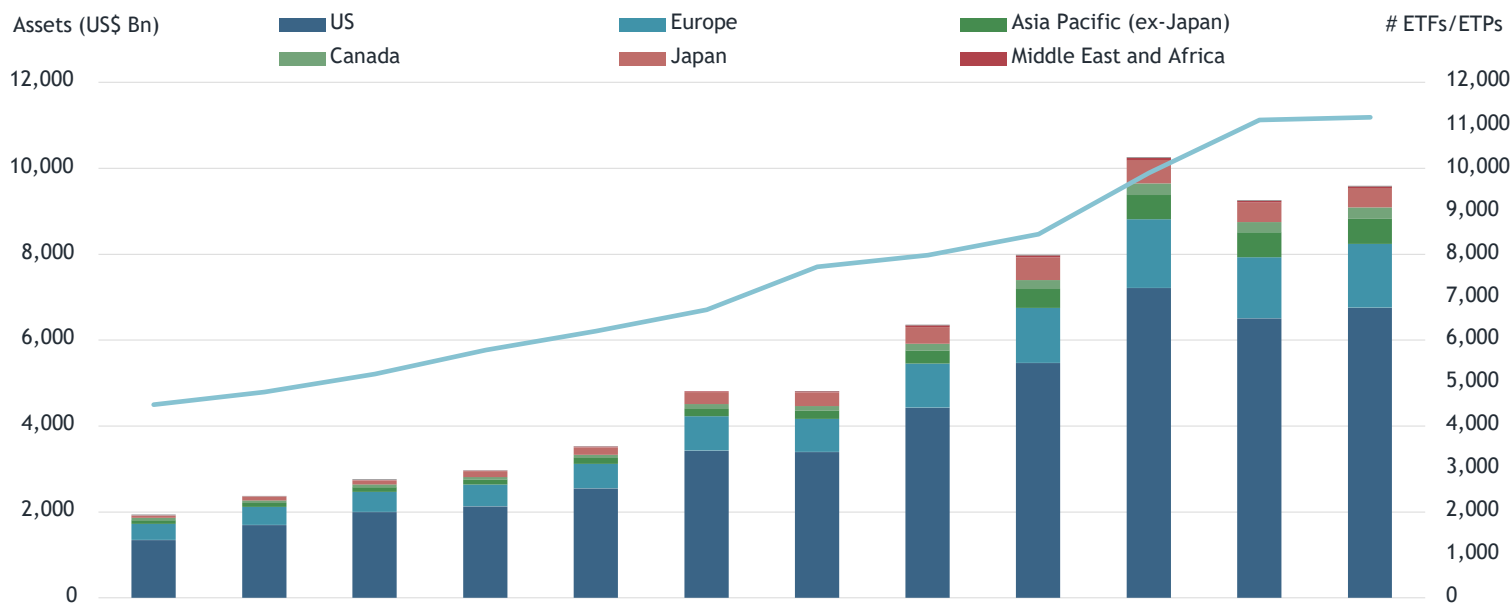
End Feb 2023:

45<sup>th</sup> months of positive inflows, Net new assets \$80 billion, AUM 9.60 trillion

10-year CAGR 16.9%, 9 new issuers, 165 new products

## Global ETFs industry asset growth by region

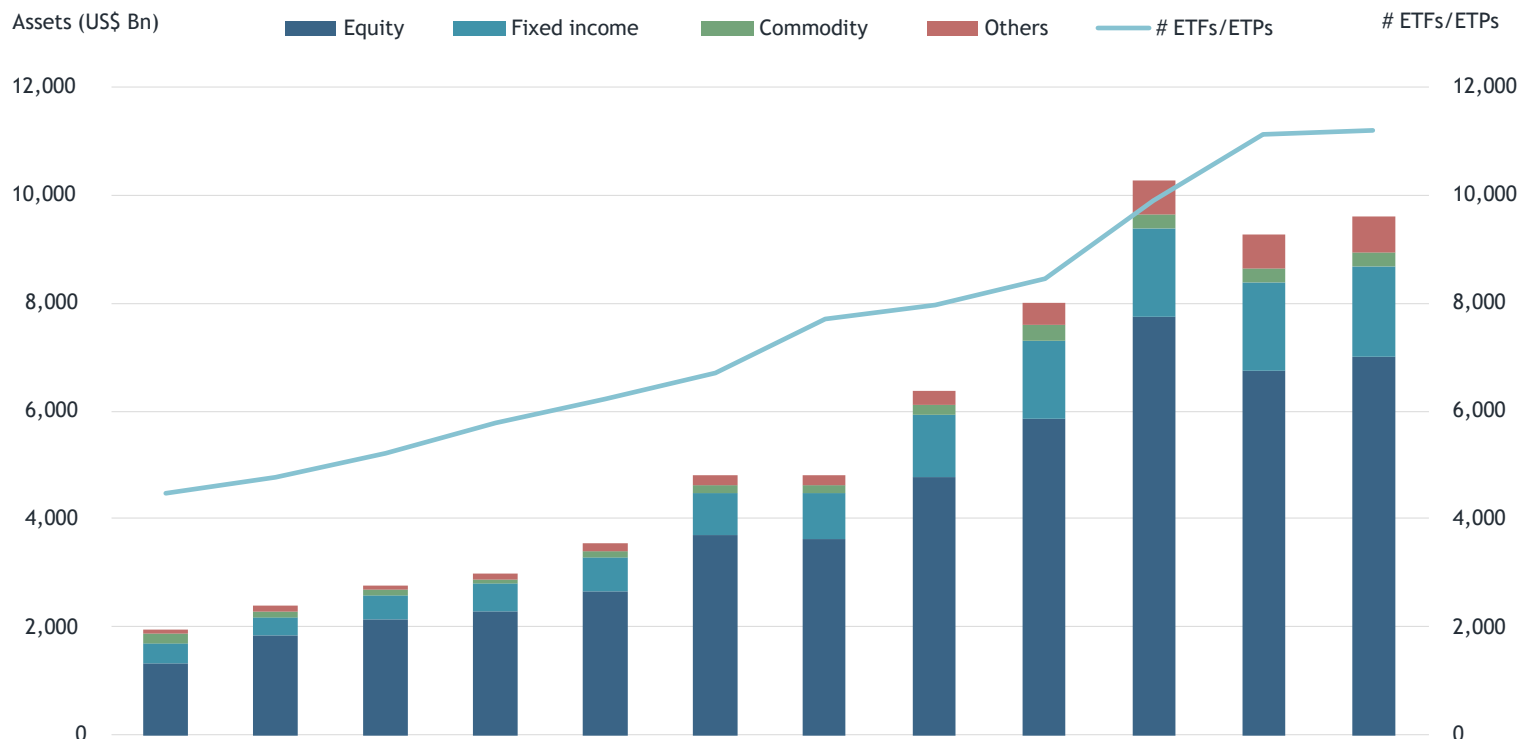
Global ETFs industry had 11,194 products, with 23,041 listings, assets of \$9.596 trillion, from 672 providers listed on 81 exchanges in 63 countries at end of February



Region Listed	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Feb-23	5-year CAGR	% market share
# ETFs/ETPs	4,493	4,788	5,209	5,768	6,209	6,706	7,707	7,979	8,461	9,897	11,131	11,194	10.7%	n/a
ETF/ETP assets	1,951	2,402	2,787	2,997	3,552	4,839	4,815	6,361	7,986	10,262	9,260	9,596	13.9%	100.0%
US	1,347	1,697	2,000	2,128	2,548	3,422	3,390	4,421	5,467	7,210	6,507	6,755	13.7%	70.3%
Europe	369	417	458	504	572	801	768	1,031	1,283	1,599	1,419	1,484	12.1%	15.3%
Asia Pacific (ex-Japan)	89	95	118	117	129	170	196	301	440	567	579	588	27.8%	6.3%
Canada	57	59	66	65	85	117	115	157	202	273	250	261	16.4%	2.7%
Japan	49	77	90	136	173	276	308	400	535	541	454	457	10.5%	4.9%
Middle East and Africa	10	13	14	12	13	15	29	36	45	54	35	35	-5.3%	0.4%
Latin America	12	11	10	5	5	7	8	14	14	19	17	17	20.1%	0.2%

Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house.

# Global ETF and ETP asset growth by asset class as at end of February 2023



Asset Class	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Feb-23	5-year CAGR	% market share
# ETFs/ETPs	4,493	4,788	5,209	5,768	6,209	6,706	7,707	7,979	8,461	9,897	11,131	11,194	10.7%	n/a
ETF/ETP assets	1,951	2,402	2,787	2,997	3,552	4,839	4,815	6,361	7,986	10,262	9,260	9,596	13.9%	100.0%
Equity	1,338	1,843	2,150	2,297	2,683	3,710	3,624	4,784	5,864	7,758	6,753	7,017	12.7%	72.9%
Fixed income	348	359	439	499	618	782	859	1,143	1,442	1,632	1,634	1,669	15.9%	17.6%
Commodities	196	111	97	81	114	134	129	170	275	262	248	245	13.1%	2.7%
Others	82	89	100	120	136	181	203	263	405	610	624	664	28.1%	6.7%

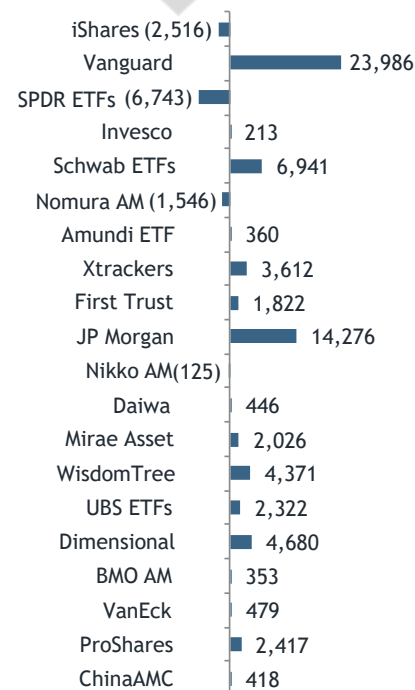
Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house.  
 Note: 'Others' includes ETFs/ETPs providing exposure to active, alternative, currency, inverse, leveraged, leveraged inverse and mixed asset classes.

## Top ETFs providers by assets: Global

iShares is the largest provider with US\$3.035 Tn, 31.6% market share; Vanguard is second with \$2.127 Tn and 22.2% market share, followed by SPDR ETFs with \$1.065 trillion and 11.1% market share. The top 3 providers, out of 672, account for 64.9% of Global assets.

Provider	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	% market share	ADV (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
iShares	1,046	3,035,070	31.6%	34,830	(11,570)	(2,516)	22,405	218,980
Vanguard	181	2,126,913	22.2%	8,617	10,954	23,986	61,464	216,814
SPDR ETFs	268	1,064,870	11.1%	48,399	(11,560)	(6,743)	(2,789)	29,988
Invesco	436	416,841	4.3%	17,841	1,712	213	3,591	29,869
Schwab ETFs	29	274,882	2.9%	1,117	1,676	6,941	7,833	35,534
Nomura AM	89	200,396	2.1%	670	(681)	(1,546)	2,506	2,493
Amundi ETF	396	188,965	2.0%	345	(370)	360	7,706	6,378
Xtrackers	286	166,841	1.7%	560	1,391	3,612	2,389	(5,496)
First Trust	248	140,049	1.5%	1,093	742	1,822	2,485	9,227
JP Morgan	84	114,340	1.2%	900	6,080	14,276	4,673	29,705
Nikko AM	41	91,691	1.0%	23	(168)	(125)	147	(471)
Daiwa	31	88,085	0.9%	35	(374)	446	(185)	(747)
Mirae Asset	508	87,755	0.9%	1,068	641	2,026	4,464	16,551
WisdomTree	340	87,578	0.9%	549	2,825	4,371	1,484	12,552
UBS ETFs	134	87,206	0.9%	122	1,135	2,322	1,681	1,745
Dimensional	30	80,633	0.8%	233	2,052	4,680	2,701	26,572
BMO AM	137	66,537	0.7%	382	708	353	874	6,335
VanEck	141	65,870	0.7%	2,173	(90)	479	3,497	3,901
ProShares	137	61,254	0.6%	13,939	852	2,417	5,087	14,659
ChinaAMC	89	44,321	0.5%	2,044	(406)	418	1,630	13,118

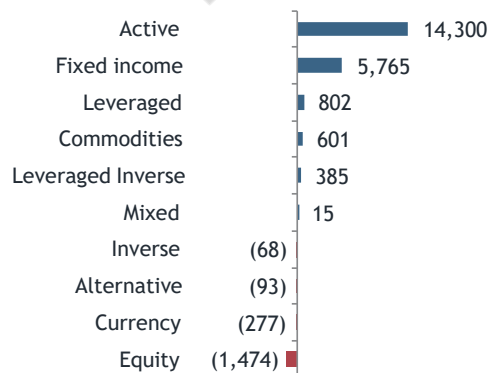
YTD ETF/ETP NNA (US\$ Mn)



Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house. Note: This report is based on the most recent data available at the time of publication. Asset and flow data may change slightly as additional data becomes available.

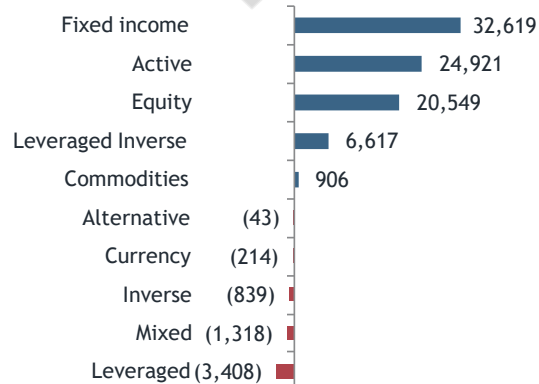
## ETFs/ETPs by asset class: Global

February 2023 ETF/ETP net new assets by type of exposure (US\$ Mn)



Total: 19,956

YTD ETF/ETP net new assets by type of exposure (US\$ Mn)



Total: 79,791

Exposure	# ETFs/ETPs	Assets (US\$ Mn) Feb-23	% market share	ADV (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Equity	5,776	7,017,080	73.1%	105,458	(1,474)	20,549	135,252	479,462
Fixed income	1,431	1,668,791	17.4%	23,950	5,765	32,619	5,783	236,553
Commodities	545	244,868	2.6%	2,596	601	906	8,506	(16,411)
Active	1,931	522,308	5.4%	7,169	14,300	24,921	22,306	123,636
Alternative	16	3,246	0.0%	96	(93)	(43)	(79)	(36)
Currency	196	10,255	0.1%	183	(277)	(214)	244	1,281
Mixed	110	19,923	0.2%	72	15	(1,318)	160	1,116
Leveraged	604	68,227	0.7%	11,776	802	(3,408)	8,960	26,061
Inverse	234	13,703	0.1%	1,370	(68)	(839)	1,551	2,779
Leveraged Inverse	351	27,970	0.3%	9,967	385	6,617	(232)	1,696
<b>Total</b>	<b>11,194</b>	<b>9,596,372</b>	<b>100.0%</b>	<b>162,636</b>	<b>19,956</b>	<b>79,791</b>	<b>182,453</b>	<b>856,139</b>

Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house. Note: This report is based on the most recent data available at the time of publication. Asset and flow data may change slightly as additional data becomes available. Israel ETP assets and flows are included in the total figures but are not reflected in the asset class breakdown.



## Product Trends

Product innovation is happening in Fixed Income, Active, ESG, Thematic and Crypto

Market Cap (Equity)						
	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Global	4,932	5,582,750	(3,641)	12,477	108,773	366,197
US	892	3,853,611	(8,220)	(1,672)	48,417	208,121
Europe	1,467	885,774	8,781	18,455	27,534	47,792
Canada	237	110,981	497	114	5,426	7,916
Asia Pacific (ex-Japan)	1,675	387,221	(5,061)	(4,161)	23,640	93,491
Japan	171	309,330	(198)	183	2,622	6,522

*\*excludes actively managed products*

Thematic						
	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Global	1,388	235,225	1,541	1,935	8,593	28,780
US	396	112,224	(232)	(706)	638	575
Europe	294	56,337	758	1,439	1,013	6,758
Canada	96	3,435	(36)	(45)	60	316
Asia Pacific (ex-Japan)	499	58,135	1,179	1,403	6,737	20,072
Japan	22	1,056	(8)	(17)	9	(7)

Fixed Income						
	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Global	1,431	1,668,791	5,765	32,619	5,783	236,553
US	323	1,178,507	831	19,326	(1,585)	183,132
Europe	479	337,276	602	9,540	3,651	34,135
Canada	131	46,708	1,104	688	(464)	5,909
Asia Pacific (ex-Japan)	282	93,802	3,099	2,942	3,865	14,684
Japan	27	3,403	204	100	518	(937)

*\*excludes actively managed, leverage/inverse derivative products*

ESG						
	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Global	1,322	420,135	7,633	13,217	18,272	74,754
US	298	108,004	1,850	1,076	2,443	4,714
Europe	594	270,803	4,636	11,059	12,113	56,138
Canada	119	8,039	294	429	516	2,378
Asia Pacific (ex-Japan)	235	28,365	936	778	3,022	10,739
Japan	30	2,297	(42)	(169)	116	659

Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house. Note: This report is based on the most recent data available at the time of publication. Asset and flow data may change slightly as additional data becomes available. Israel ETP assets and flows are included in the total figures but are not reflected in the asset class breakdown.

## Product Trends

### Actively Managed

	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Global	1,931	522,308	14,300	24,921	22,306	123,636
US	1,058	379,609	10,765	19,366	17,455	99,003
Europe	87	22,873	110	840	874	2,753
Canada	478	70,138	1,973	2,818	2,316	15,406
Asia Pacific (ex-Japan)	277	49,472	1,445	1,890	1,780	4,331
Japan	-	-	-	-	-	-

### Crypto

	# ETFs/ ETPs	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23	NNA (US\$ Mn) YTD 2023	NNA (US\$ Mn) YTD 2022	NNA (US\$ Mn) 2022
Global	159	8,154	(60)	156	140	703
US	7	964	(8)	75	21	325
Europe	109	4,681	6	120	(128)	65
Canada	19	1,792	(38)	28	128	(74)
Asia Pacific (ex-Japan)	6	77	(7)	(27)	-	82
Japan	-	-	-	-	-	-

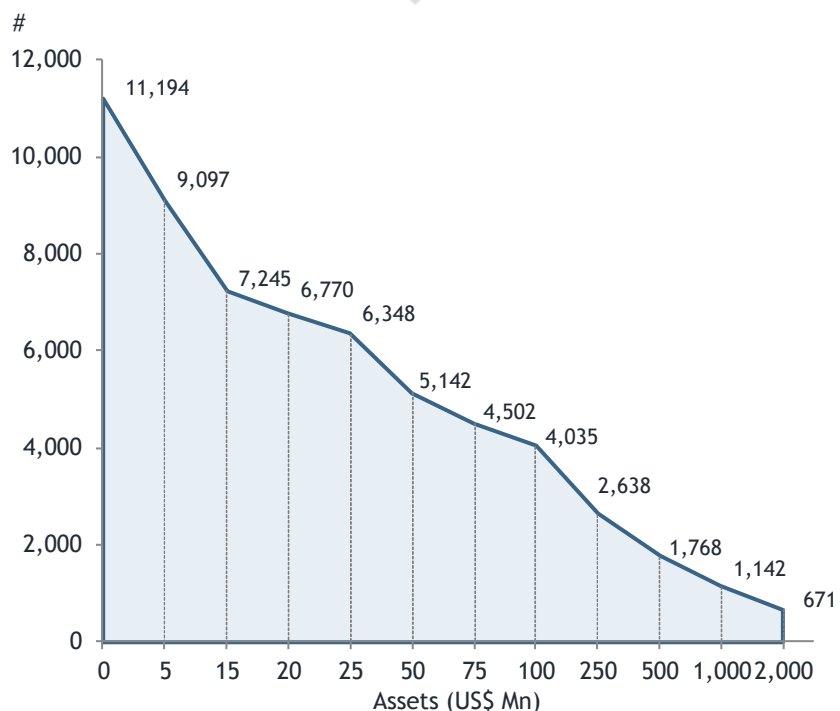
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## ETFs/ETPs by size

The 671 products have assets of \$2 Bn or more. They account for \$7.770 trillion, or 81.0%, of global assets.

4,035 or 36% of all ETFs have assets of \$100 Mn or more. They account for 98% of all global assets. 64% of products account for 2% of assets

ETF/ETP assets



Assets greater than (US\$ Mn)	# ETFs/ETPs	% total	Total assets (US\$ Bn)	% total
0	11,194	100.0%	9,596	100.0%
5	9,097	81.3%	9,577	99.8%
15	7,245	64.7%	9,560	99.6%
20	6,770	60.5%	9,552	99.5%
25	6,348	56.7%	9,542	99.4%
50	5,142	45.9%	9,499	99.0%
75	4,502	40.2%	9,460	98.6%
100	4,035	36.0%	9,419	98.2%
250	2,638	23.6%	9,193	95.8%
500	1,768	15.8%	8,882	92.6%
1,000	1,142	10.2%	8,436	87.9%
2,000	671	6.0%	7,770	81.0%

Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house.

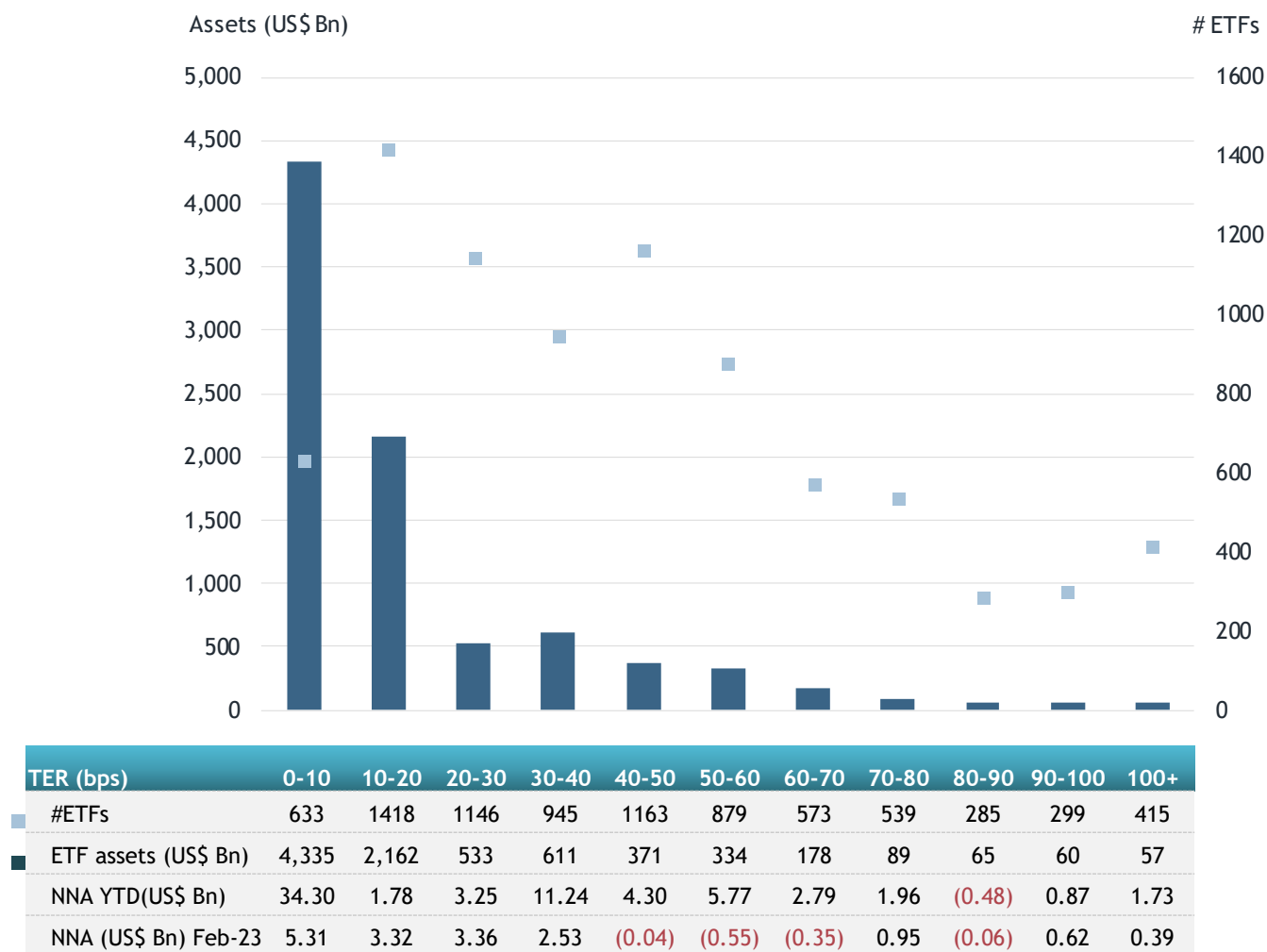
## Total expense ratios: Global

Just 633 or 5.6% of the 11,194 products have an annual expense ratio of 10bps or less but account 45% of global assets.

68% of the \$9.6 Tn AUM and 45% of the \$79.9 Bn of YTD NNA has gone into 2,051 or 18% of the products with an annual expense rate of 20 bps or less

### Average TER (bps)

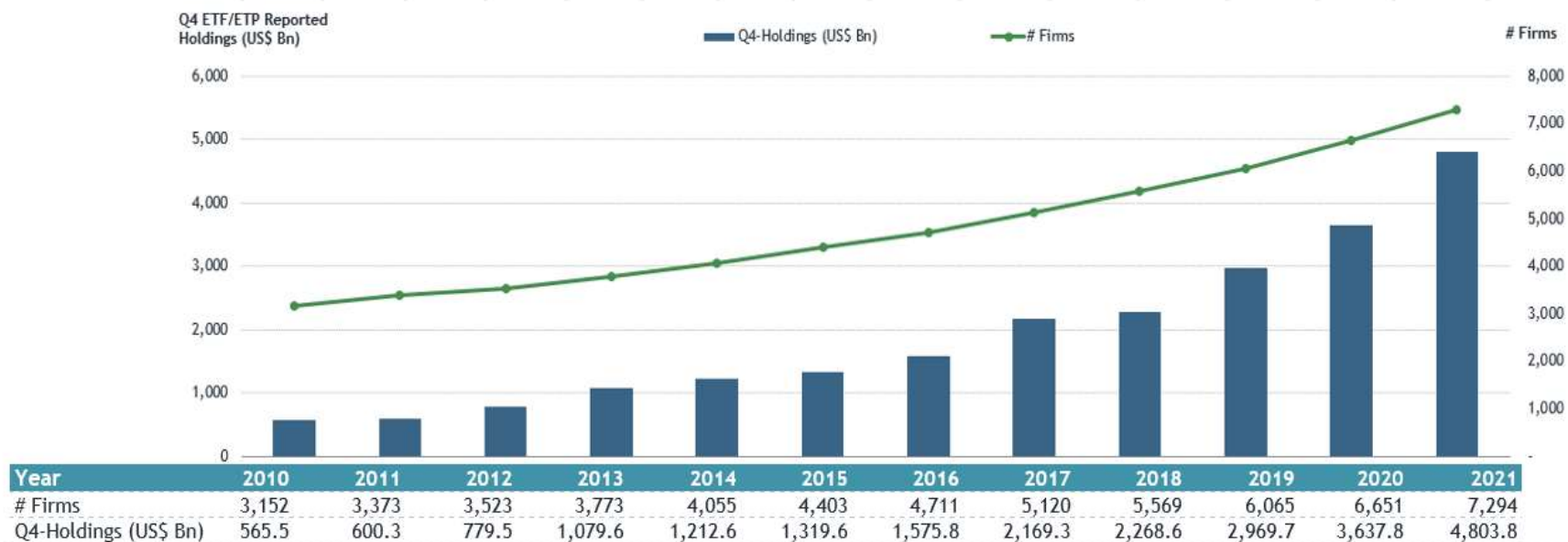
Asset class	ETFs	ETFs/ETPs
Equity	18	18
Fixed Income	15	15
Commodities	42	37
Currency	85	132
Alternative	86	85
Mixed	52	53
Active	44	44
Inverse	83	83
Leveraged	96	96
Leveraged Inverse	93	92
<b>All</b>	<b>20</b>	<b>20</b>



Note: #ETFs and assets refers only to 'primary listings' and may not sum to the full totals where fees are unavailable. Management fees may be used where the TER is unavailable. Source: ETFGI data sourced from ETF/ETP sponsors, exchanges, regulatory filings, Thomson Reuters/Lipper, Bloomberg, publicly available sources and data generated in-house.

# Distribution - Growth in Institutional use of ETFs / ETPs

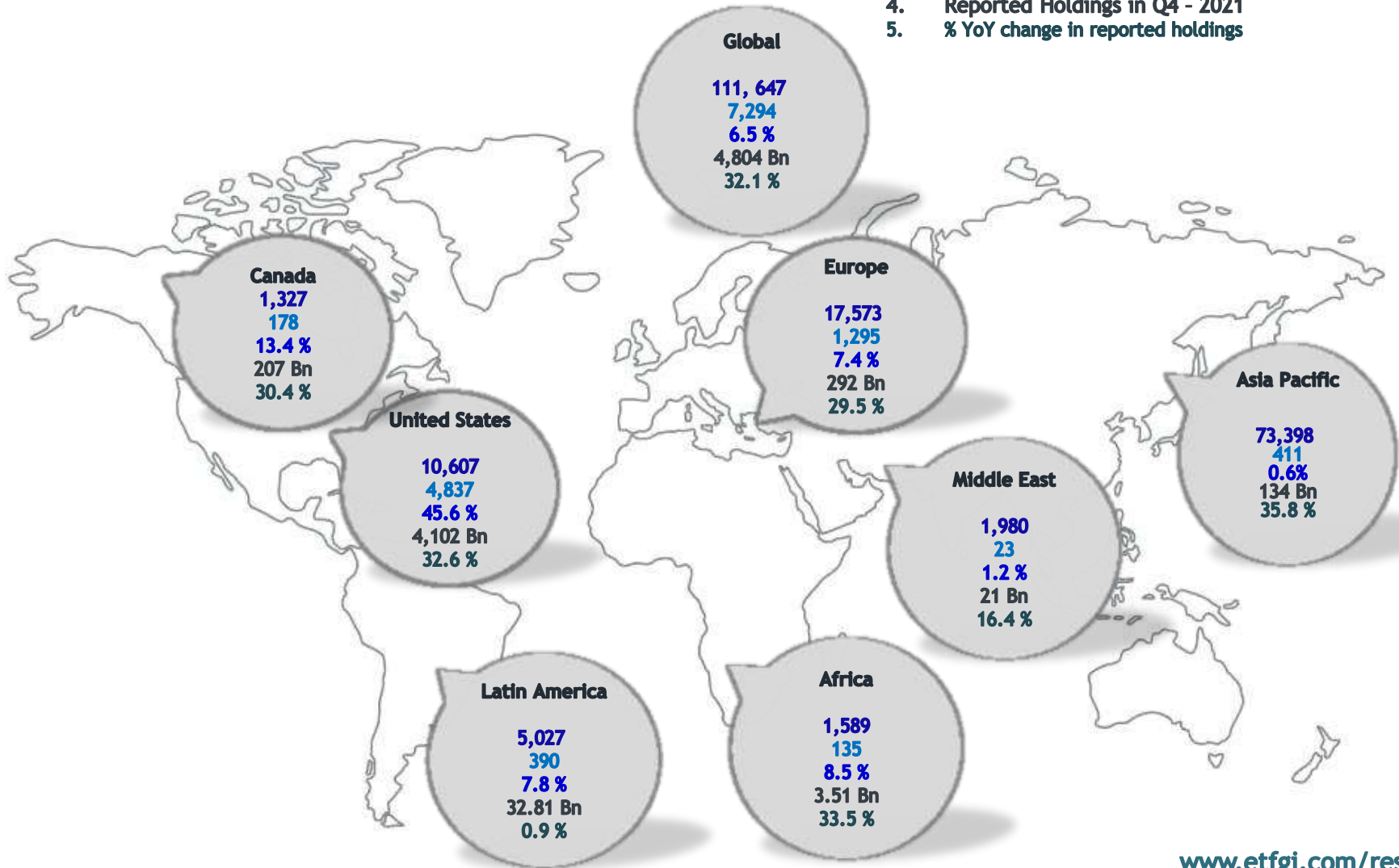
## Historical reported ETF/ETP holdings: global



Source: ETFGI, Thomson Reuters. Note: #Firms reflects the number of firms reported holding one or more ETF or ETP in any of the 4 (quarterly) periods in each year. Q4-Holdings reflects the US dollar value of reported ETF and ETP holdings for just the Q4 reporting period only (Q4 is isolated as we do not combine \$ values from different reporting periods).

# ETFs investors

1. All institutions
2. Institutions reported using at least one ETF or ETP
3. % ETF/ETP Users
4. Reported Holdings in Q4 - 2021
5. % YoY change in reported holdings



[www.etfgi.com/research](http://www.etfgi.com/research)

# Opportunities for ETFs

Evolving opportunities - retail investors, financial advisors and model portfolios

Once investor uses an ETF they tend to invest more, use more often and in larger size

Covid drove new investors into the stock 15% of investors in US stock market were new investors in 2021\*

93% of retail investors using ETFs expect to consider purchasing an ETF in next 2 years

41% non-ETF investors expect to consider purchasing an ETF in next 2 years

80% of ETF investors agree ETFs is vehicle of choice

Share of ETFs in portfolio has been growing from 2017 - 2022 grew from 27% to 33% in 5 years expect 40%

Model portfolios will drive the use of ETFs

Digital platforms will drive adoption

\*Charles Schwab studies

## The future -

Regulations, product and distribution innovations will drive growth

New investors using ETFs, more investments from existing investors



New asset managers launching ETFs



New types of ETFs















New markets for ETFs



















## ETFs/ETPs listed by region/country: Global

North America		# ETFs/ETPs	# listings	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23
Canada		1,071	1,364	260,561	3,497
US		3,119	3,119	6,754,948	8,173
<b>Total</b>		<b>4,190</b>	<b>4,483</b>	<b>7,015,509</b>	<b>11,670</b>

Europe		# ETFs/ETPs	# listings	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23
Austria		2	107	173	39
Belgium		1	15	49	-
Bulgaria		16	16	62	(0)
Croatia		2	2	10	-
Denmark		1	1	288	-
Finland		1	1	433	-
France		355	705	154,924	863
Germany		806	2,844	371,589	(119)
Greece		1	1	27	-
Hungary		1	8	7	(0)
Iceland		1	1	0	-
Ireland		0	5	0	-
Italy		215	1,781	19,209	88
Netherlands		119	621	31,211	220
Norway		1	1	211	-
Poland		8	10	96	0
Portugal		0	0	0	-
Romania		2	2	5	-
Russia		65	72	2,061	-
Slovenia		0	7	0	-
Spain		5	5	712	(24)
Sweden		14	18	6,644	13
Switzerland		287	2,173	201,635	922
Turkey		15	15	1,655	772
United Kingdom		1,023	3,501	692,823	5,831
<b>Total</b>		<b>2,941</b>	<b>11,912</b>	<b>1,483,824</b>	<b>8,606</b>

Middle East and Africa		# ETFs/ETPs	# listings	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23
Botswana		0	5	0	-
Egypt		1	1	3	-
Ghana		0	1	0	-
Iran		25	25	0	-
Israel		500	539	25,816	334
Kenya		0	1	0	-
Mauritius		2	4	47	-
Namibia		0	11	0	-
Nigeria		11	12	18	-
Qatar		2	2	254	(3)
Saudi Arabia		8	8	399	(7)
South Africa		187	188	7,973	(24)
UAE		8	11	222	(1)
Zimbabwe		1	1	4	-
<b>Total</b>		<b>745</b>	<b>809</b>	<b>34,736</b>	<b>300</b>

Asia Pacific		# ETFs/ETPs	# listings	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23
Australia		303	323	93,727	553
China		781	782	215,571	(5,655)
Hong Kong		172	268	45,958	976
India		169	169	61,034	82
Indonesia		48	49	948	(6)
Japan		275	308	456,709	(1,329)
Kazakhstan		15	22	9	-
Malaysia		19	20	513	0
New Zealand		36	36	3,694	(2)
Pakistan		7	7	3.0	(0)
Philippines		1	1	38	0
Singapore		29	63	8,124	(255)
South Korea		1,039	1,039	75,604	1,289
Taiwan		269	274	81,202	3,576
Thailand		13	13	541	-
Vietnam		9	9	1,335	1
<b>Total</b>		<b>3,185</b>	<b>3,383</b>	<b>1,045,011</b>	<b>(769)</b>

Latin America		# ETFs/ETPs	# listings	Assets (US\$ Mn) Feb-23	NNA (US\$ Mn) Feb-23
Brazil		94	298	8,108	59
Chile		6	306	124	5
Colombia		2	33	1,333	(4)
Mexico		24	1,576	7,384	97
Bermuda		6	6	276	(7)
Argentina		0	9	0	-
Peru		1	226	49	(0)
<b>Total</b>		<b>133</b>	<b>2,454</b>	<b>17,274</b>	<b>150</b>

Source: ETFGI, Bloomberg, ETF/ETP providers, Bank of Israel, WIND, Tehran Stock Exchange. The data for Iran is as at the end of May 2017.

# Thank you

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Previously, Deborah Fuhr served as global head of ETF research and implementation strategy and as a managing director at BlackRock/Barclays Global Investors from 2008 - 2011. She also worked as a managing director and head of the investment strategy team at Morgan Stanley in London from 1997 - 2008, and as an associate at Greenwich Associates.

She has been working with investors, ETF, ETP providers, index providers, exchanges, MMs and APs, regulators, trade associations, custodians, law firms, accounting firms around the world since 1997. ETFGI is honored to count as our research and consulting clients some of the leading firms in the ETF Ecosystem around the world as well as some new entrants and firms that are considering entering the ETF, ETP industry.

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ETFGI

ETFGI  
125 Old Broad Street  
London EC2N 1AR  
United Kingdom  
+44 20 3440 9696  
+44 77 7582 3111  
[contact@etfgi.com](mailto:contact@etfgi.com)

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