

Asset Servicing Volumes Surge 25% YOY, Triggering a New Era of Automation and Efficiency, New Broadridge Study Finds

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- Asset servicing volumes grow by over 25% for nearly all market participants
- Legacy technology and multiple platforms are the top obstacles to enhancing client experience and mitigating risk across all asset servicing activities
- 57% of asset servicing leaders cite tech companies as a critical enabler for meaningful scale and automation
- Process re-engineering cited as the most effective area of change over the last five years and a critical driver of automation

NEW YORK and LONDON, Oct. 16, 2025 /PRNewswire/ -- **Broadridge Financial Solutions** Inc. (NYSE: BR), a global Fintech leader, today released a new global study titled "**Broadening Asset Servicing 2025**" in partnership with the International Securities Services Association (ISSA) and The ValueExchange. The study draws insights from over 270 industry leaders worldwide on the innovation, priorities and challenges that are shaping the future of asset servicing.

"Global asset servicing leaders are at a crossroads – transaction volumes and processing complexity are accelerating at a rapid pace, yet growth is constrained by legacy technology, increased risk and escalating data costs," said Mike Alexander, President of Broadridge Wealth Management. "As firms, traders and investors demand increased real-time digital automation, and enhanced risk management, we see immense opportunity for firms to reimagine asset servicing through a single platform encompassing the entire asset service life cycle, leveraging AI, common data and strategic outsourcing. The future of asset servicing depends on the industry's ability to increase real-time straight through processing, capture tax rules and efficiency upstream, and leverage common data with the client at the center."

Asset Servicing Volumes Surge but Errors are Driven by Poor Data Quality

According to the study, asset servicing volumes are climbing by more than 25% year-over-year. Amid this surge, industry leaders grapple with challenges stemming from antiquated processes - often batch-based - and multiple data sources with up to 67% of asset servicing errors linked to poor data quality. Legacy technology remains the single-biggest obstacle to asset servicing automation.

Outsourcing has emerged as a critical strategy to manage rising complexity - particularly in tax reporting, event capture, tax reclaims, proxy voting and class actions - where firms that outsource report significantly lower error rates and reduced costs compared to those maintaining in-house processes.

Technology Providers Crucial to Enabling Change

Nearly 60% of total servicing resources were reported as being consumed by income and voluntary corporate actions, creating major operational strain. Meanwhile, over 60% of brokers reported a decline in automation levels, directly contributing to rising error rates and higher costs. Issuers aim to deliver accuracy and timeliness - but 53% know that they are not enabling automation. To further accelerate modernization across the industry, over half (57%) of respondents view tech companies as a critical enabler of golden source data, underscoring their essential role in enabling asset servicing providers to grow and scale effectively and cost-effectively.

Client Demand Fuels Investments Despite Budget Constraints

Client expectations remain the single largest driver of investment in asset servicing (38%), followed by efforts to reduce errors (33%) and meeting regulatory requirements (9%). While some firms expect to reduce asset servicing costs over the next five years [brokers (13%), exchange / technology providers (9%), custodians (8%) and investors (7%)], most firms are prioritizing technology investments that enhance efficiency and profitability.

As firms seek to boost asset servicing profitability, they are decisively shifting investment towards technology - with many citing process re-engineering as the most effective area of change over the last five years and a critical driver of automation.

Methodology

The ValueExchange Asset Servicing Survey is an annual global benchmarking study focused on understanding trends and best practices in asset servicing. It gathers quantitative and qualitative data from a wide range of market participants - including asset managers, custodians, and other financial institutions - through structured online questionnaires and a sample size of over 270 responses. The methodology used emphasizes anonymized,

comparative analysis across geographies, firm types, and service models, ensuring statistical reliability and practical insights into efficiency, client experience, and operational performance.

To access the report, visit **Broadening Asset Servicing 2025**.

About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with trusted expertise and transformative technology, helping clients and the financial services industry operate, innovate, and grow. We power investing, governance, and communications for our clients – driving operational resiliency, elevating business performance, and transforming investor experiences.

Our technology and operations platforms process and generate over 7 billion communications annually and underpin the daily average trading of over \$15 trillion in equities, fixed income, and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 15,000 associates in 21 countries.

For more information about us, please visit www.broadridge.com

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