

# Broadridge Named a Leader in Wealth Management Technology in IDC MarketScape 2025 Assessment

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NEW YORK, Dec. 2, 2025 /PRNewswire/ -- **Broadridge Financial Solutions, Inc.** (NYSE: BR), a global Fintech leader, today announced that it has been positioned as a Leader in the inaugural IDC MarketScape: Worldwide Wealth Management Technology Services for Investment Advisors 2025 Vendor Assessment (doc #US50734024, October 2025). The IDC MarketScape evaluated 13 worldwide technology providers across two dimensions – Capabilities and Strategy – and Broadridge was named to the Leaders Category for both. Broadridge believes this recognition is a strong testament to the strength, scale and reliability of its comprehensive and integrated wealth management platform, and its continued innovation through strategic investments and acquisitions.

"The investment advisory business is under pressure to modernize platforms while managing risk, cost, and disruption. In our assessment, Broadridge was recognized for the breadth and integration of its wealth management capabilities, from advisor workflow solutions through to post-trade processing. Its open, component-based architecture gives firms practical options to simplify vendor landscapes and advance toward a more unified wealth technology stack at their own pace," said Thomas Shuster, Research Director, Worldwide Capital Markets, Wealth, and Digital Asset Strategies, IDC.

"We believe being recognized as a wealth management Leader by the IDC MarketScape reflects our commitment to helping the industry advance toward the next generation of wealth management and reinforces Broadridge's role as a trusted technology partner powering transformation across the North American wealth management industry," said Mike Alexander, President of Wealth Solutions at Broadridge. "Firms need flexible, integrated technology that enables greater advisor productivity, stronger client engagement, and scalable growth. Broadridge's future-ready wealth platform is designed to help clients modernize their operations and deliver a more connected, digital wealth experience."

According to the IDC MarketScape, "Traditionally known for investor communications and post-trade processing, Broadridge has made significant strides in wealth management technology in recent years. It has built a platform that spans front-, middle-, and back-office functions for broker-dealers and wealth managers. This modular wealth platform, often delivered in components, includes advisor desktops and client engagement tools, portfolio management and performance reporting, an aggregated data layer, and core brokerage processing capabilities." The report recognized Broadridge for the following strengths:

- Comprehensive front-to-back solution: Broadridge's Wealth Platform offers virtually all components needed by a wealth management firm on an integrated basis. Firms can benefit from having a single vendor for advisor front ends, portfolio management, and back-office processing — reducing fragmentation and data silos. Broadridge's highly integrated component-based architecture and open platform approach help support firms' unique needs and optimize their spending.
- Scale and reliability: As a large S&P 500 company, Broadridge brings financial stability, extensive industry experience, and robust infrastructure (it processes trillions in trades daily for global institutions). Clients gain a partner with deep resources for ongoing support, regulatory updates, and cybersecurity — a vital strength for large enterprises.
- Acquisition-driven innovation: Broadridge has filled gaps in its wealth offering via strategic acquisitions. The inclusion of RPM's enterprise wealth system and AdvisorStream's digital engagement tools, for example, have enhanced the platform's capabilities. This strategy allows Broadridge to offer modern, feature-rich components (e.g., advisor marketing, multi-custody portfolio management) that keep pace with evolving advisor needs.

Broadridge continues to advance its wealth platform in close collaboration with its clients, whose partnership and ongoing feedback help shape the platform's evolution.

## About IDC MarketScape

IDC MarketScape vendor assessment model is designed to provide an overview of the competitive fitness of technology and service suppliers in a given market. The research utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each supplier's position within a given market. IDC MarketScape provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of technology suppliers can be meaningfully compared. The framework also provides technology buyers with a 360-degree assessment of the strengths and weaknesses of current and prospective suppliers.

## About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with trusted expertise and transformative technology to help 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 per year and underpin the daily average trading of more than \$15 trillion of equities and fixed income trades. 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](http://www.broadridge.com)

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