

BENORI



CASE STUDY

Conducting Opportunity Assessment for a Leading Bank



● OBJECTIVE AND SCOPE

The client, a leading private bank, wanted to conduct an in-depth assessment of the opportunity areas for its services. It sought Benori's support in understanding:

- Market and industry growth trends for private banking services for the high-net-worth individuals (HNIs) segment
- Competitive landscape of 7-8 leading players
- Consumer needs gaps





● APPROACH

We conducted in-depth secondary research to understand the competitor landscape, HNIs, and trends in the movement of India's wealth and their drivers, growth prospects, and investment inclinations. We conducted primary research, including interviews with industry experts, affluent individuals, and HNIs to understand their investment-making journeys and expectations.



● METHODOLOGY



Secondary
Research



Primary
Research



Data
Modeling



● IMPACT

The detailed insights helped the client in:

- Understanding the total addressable market for its services
- Assessing competitors' business model, service offerings, strategy, positioning, focus, distribution/service channel
- Consumers' views and perceptions towards the investment solutions and wealth services offered in the market





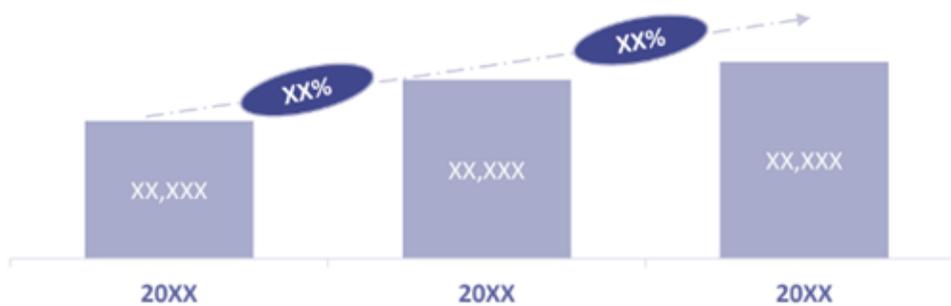
SAMPLE OUTPUT

Market Overview



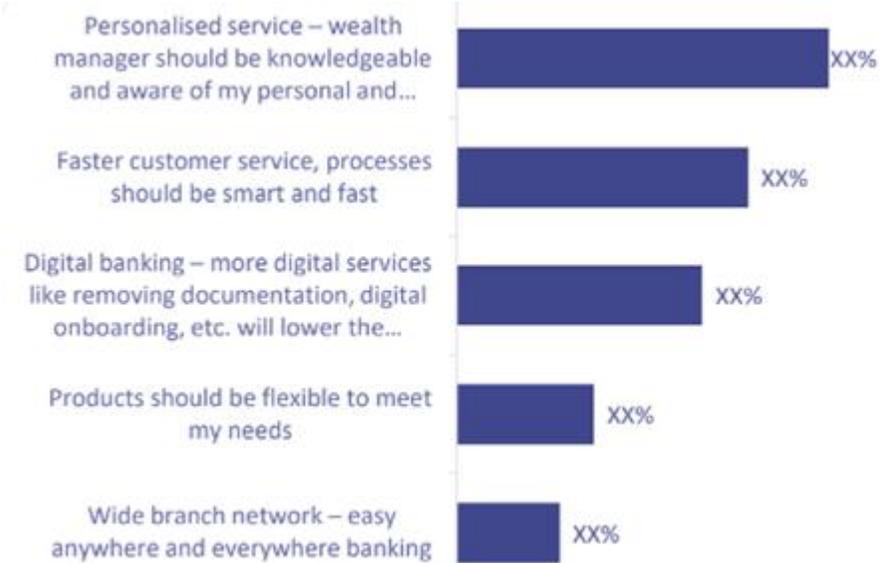
Market Overview

Net wealth per individual in India, 20XX-20XX, in USD



*Net wealth per adult = Financial assets per adult + Non-financial assets - Debts

Customer Expectations



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