Press Release

Brookfield

New Brookfield Research Highlights Growing Alternatives Adoption and Expertise Among European Wealth Managers

More than half believe an optimal alternatives allocation is 16-25%, while 83% say alternatives are used as much for risk management as return generation

NEW YORK – June 25, 2026 – Brookfield today released new research from its Alts Institute highlighting how wealth managers in the U.K. and Switzerland are increasingly integrating alternatives into client portfolios. The study, which was conducted by independent research organization CoreData, surveyed more than 600 wealth managers with an average practice AUM of US $657 million and 60 fund selectors in the U.S., Canada, the U.K. and Switzerland responsible for evaluating alternative asset managers and products for firm platforms regionally and globally. The findings signal a shift in the advisory landscape as alternatives become a more established component of portfolio construction and play a growing role in helping clients achieve their investment goals.

The research also points to growing expertise in alternatives adoption. Nearly half (46%) of wealth managers in the U.K. and Switzerland qualify as alternatives "Power Users"—a cohort identified by strong current alternatives usage deployed broadly across a variety of vehicles and products. On average, “Power Users” globally report a 22% allocation to alternatives. With greater adoption of the asset class also comes higher expectations. 75% of respondents believe that wealth managers without strong alternatives offerings may be at a competitive disadvantage, while 74% say their new and prospective clients expect access to a broad range of alternatives product offerings.

Key findings among wealth managers in the U.K. and Switzerland:

Alternatives are increasingly being viewed as a core portfolio allocation

- More than half believe an optimal alternatives allocation is between 16% and 25%.
- 75% say client conversations about alternatives have shifted from basic education to discussions focused on portfolio goals and outcomes.
- 83% say alternatives are now used as much for risk management as for return generation.

Alternatives adoption continues to grow

- Wealth managers are prioritizing private equity, infrastructure, private credit and real estate for higher allocations over next one to two years.
- 64% plan to increase their use of evergreen funds over the next two years.
- 78% say understanding client liquidity needs have helped them implement alternatives more effectively.

Education remains critical

- 82% say alternatives expertise is a “must have” and 74% say it is a meaningful growth driver for their practice.

- 83% say portfolio construction support is one of the most valuable resources an alternatives partner can provide.
- 68% say that educational materials have influenced their use of alternatives.

John Sweeney, CEO of Brookfield's private wealth business, said, "Our Alts Institute survey research reinforces that alternatives have become an increasingly important part of the wealth management toolkit. As wealth managers gain experience with the asset class, conversations are shifting from understanding alternatives to determining how they can be used within a portfolio to help clients achieve specific investment objectives."

Brookfield's Alts Institute provides financial advisors with educational resources, asset allocation strategies, and best practices to unlock the opportunity of alternative investments. Learn more about the full global results here.

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About Brookfield Asset Management
Brookfield Asset Management Ltd. (NYSE: BAM, TSX: BAM) is a leading global alternative asset manager, headquartered in New York, with over $1 trillion of assets under management across infrastructure, energy, private equity, real estate, and credit. We invest client capital for the long-term with a focus on real assets and essential service businesses that form the backbone of the global economy. We offer a range of alternative investment products to investors around the world — including public and private pension plans, endowments and foundations, sovereign wealth funds, financial institutions, insurance companies and private wealth investors. We draw on Brookfield's heritage as an owner and operator to invest for value and generate strong returns for our clients, across economic cycles. For more information, please visit our website at www.brookfield.com.