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## 2<sup>nd</sup> Quarter 2024 Newsletter

Data-led solutions by TP ICAP





## Burton Taylor published new reports in the 2nd Quarter:

- *Exchange Global Share & Segment Sizing 2024*
- *Financial Market Global Share & Segment Sizing 2024*
- *Index Industry Global Share & Segment Sizing 2024*
- *Commodities & Energy: How The Return of The Hedge Funds is Influencing Demand*
- *Financial Market Desktops: Global Share & Segment Sizing 2024*



## BURTON TAYLOR Published Research 2nd Quarter 2024



### April 2024

**Exchange Global Share & Segment Sizing 2024:** *In 2023, global exchange industry revenue reached \$58.9 billion, increasing 9.7% on the year, as exchanges were able to offset stagnant trading and clearing revenues by expanding their service to data, analytics, and technology offerings*

### You Need to Buy This Report if you:

- Monitor the state of the exchange industry and analyze the competitive landscape of global securities exchanges
- Value expert views of how global exchanges' business models have shifted to emphasize data and technology
- Are a provider of technology or services in the trade execution, market data, or network services businesses

### Report Includes:

- Industry segmentation of exchange revenues from 2018 - 2023, and drivers of the trends
- Breakdowns of 5-yr revenue trends for the leading 15 global exchanges
- The outlook for exchanges' four main business lines in the coming years
- How the earnings of exchange businesses were influenced by trading, IPO issuance, and the growth of data analytics
- The impact of exchanges' diversification strategies and M&A activity on the future of the business

Global Exchange Revenue – Geographic Breakdown 2019-23





# BURTON TAYLOR

## Published Research

### 2nd Quarter 2024



April 2024

### Financial Market Data/Analysis: Global Share & Segment Sizing 2024

2023 continued financial institutions' growth on market data, increasing 12.4% to a record \$42 billion, as their reliance on data spread across all areas of their business.

#### You Need to Buy This Report if you:

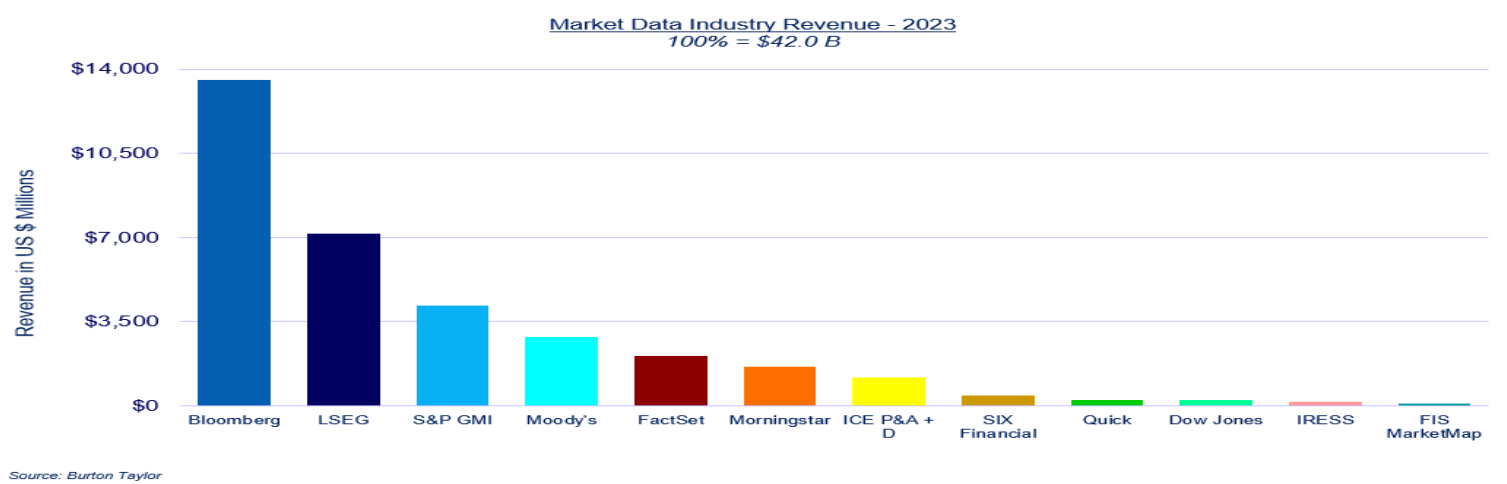
- Need to understand the size and segmentation of market data usage and drivers of growth in the past five years.
- Benefit from understanding the providers' market share in all areas of the data segment
- Follow the competitive landscape of the leading data providers in this space

#### This report allows market data vendors or industry analysts to:

- Measure the penetration and growth of competitor services
- Evaluate the past success of company and competitor actions
- Isolate and target new and changing growth opportunities

#### This report allows market data users to:

- See the current, historical, regional, and global share leaders within the segments they operate
- Target a market-leading vendor appropriate to their needs



# BURTON TAYLOR

## Published Research

### 2nd Quarter 2024



May 2024

### Index Industry Global Share & Sizing 2024:

This new report is sufficiently detailed to allow index providers or industry analysts to clearly understand competitive positioning currently, historically, globally, regionally, and within individual demand segments and to enable index services or data users to make better informed, more confident, and more appropriate purchase decisions, which could result in greater profitability.

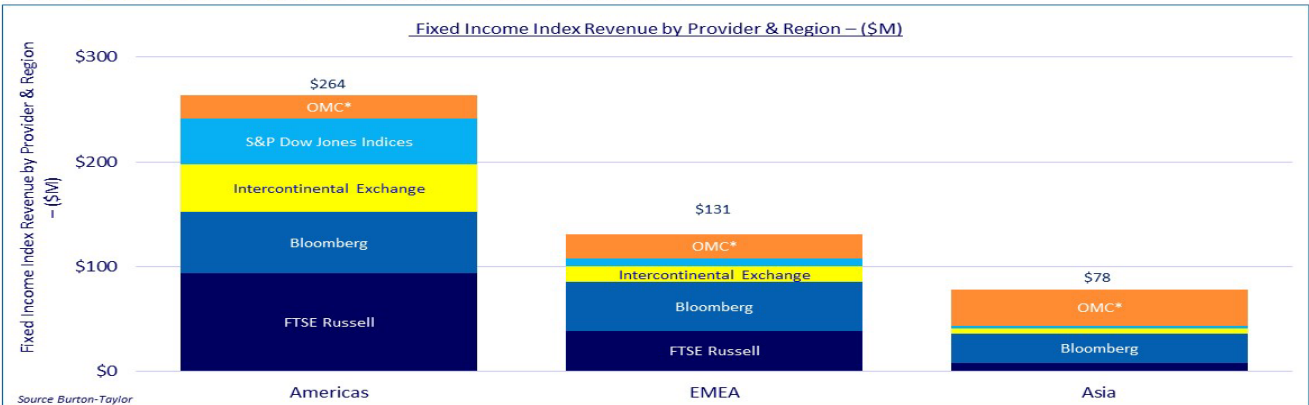
#### You Need to Buy This Report if you:

- Are industry analysts, index providers, private equity firms, investment bankers, or product managers that monitor the index industry
- Measure the penetration and growth of competitor services or isolate new and changing growth opportunities in the rapidly evolving index business
- Determine the leading current and historical global share leaders

Report Content
<ul style="list-style-type: none"><li>• Total Global Index Industry revenue climbed 9.3% in 2022, rising to \$5.8 billion for the year, as increased asset-based fees from ETFs and mutual funds fueled industry growth.</li></ul>
<ul style="list-style-type: none"><li>• Growth areas across each of the equities, fixed income, ESG and other thematic indexes</li></ul>
<ul style="list-style-type: none"><li>• How the dynamics of the trading markets influence index investing and the revenues generated from it</li></ul>
<ul style="list-style-type: none"><li>• The results of recent innovation in the index business and how it's shaping the industry leaders</li></ul>

#### Index Industry – Fixed Income Index Share 2022

- Data providers dominate the Fixed Income segment, with the top four providers making up 82.9% of total revenues.
- For the 4 leading providers S&P DJ Indices saw the biggest growth, adding 16.5% year-over-year.
  - In 2022 S&P DJ Indices and IHS Markit were filed in 10K in combination. In 2021 both firms filled their totals separately
- OMC\* (Other Monitored Companies) Vendors, Morningstar, Qontigo, Solactive, SIX, Other



# BURTON TAYLOR'S Published Research 2nd Quarter 2024

May 2024

## Commodities & Energy: How The Return of The Hedge Funds is Influencing Demand

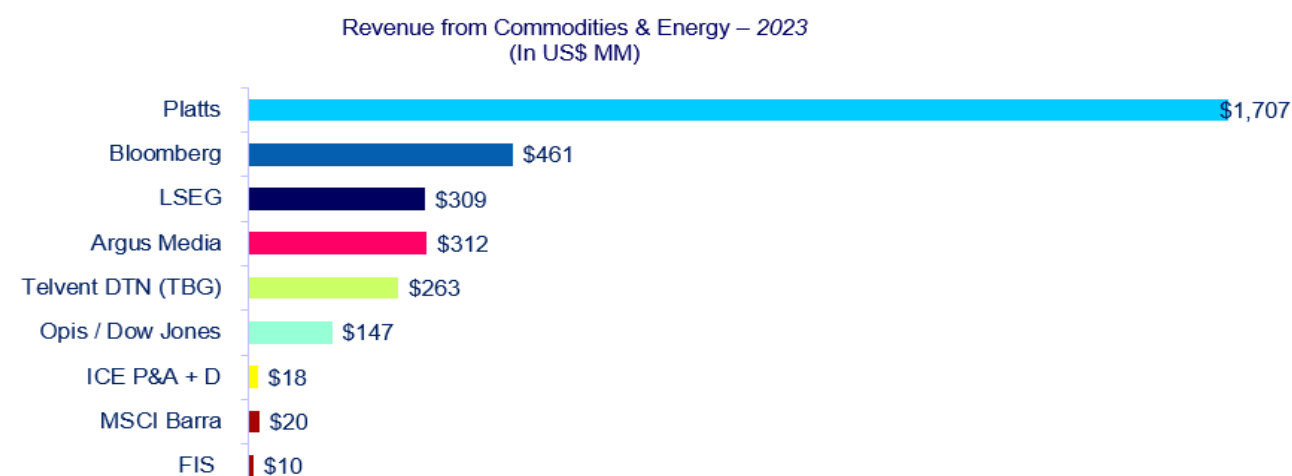
As a market data provider, in which areas do you maintain a competitive share, and what trends may indicate future opportunities? As a market data user, which vendor is most used by your peers and most likely to meet your global market data/analysis needs? As a market data industry analyst, in which areas do your companies maintain a competitive share, and what trends may indicate future opportunities?

### Report Includes:

- Nine company "Market Sheets" each showing estimated global share, regional distribution, desktop/data feed estimates, and business demographics, illustrating segment revenue distribution and commentary
- Chart showing how much Commodities & Energy data spend is as a percentage of overall data spend.
- Five-year market share revenue for companies included in Market Sheets.
- Fourteen-year chart depicting the overall Commodities & Energy spending.

### Sample Findings:

- Company X commands the leading market share, up slightly to x%, Company Y's share slid to x%, and Company Z's share increased to x%.
- Demand for Commodities & Energy market data spiked with 2022's increase in inflation and energy prices, with spending on this data growing x%.



Source: Burton-Taylor International Consulting

# BURTON TAYLOR'S Published Research 2nd Quarter 2024

June 2024

## Financial Market Desktops 2024

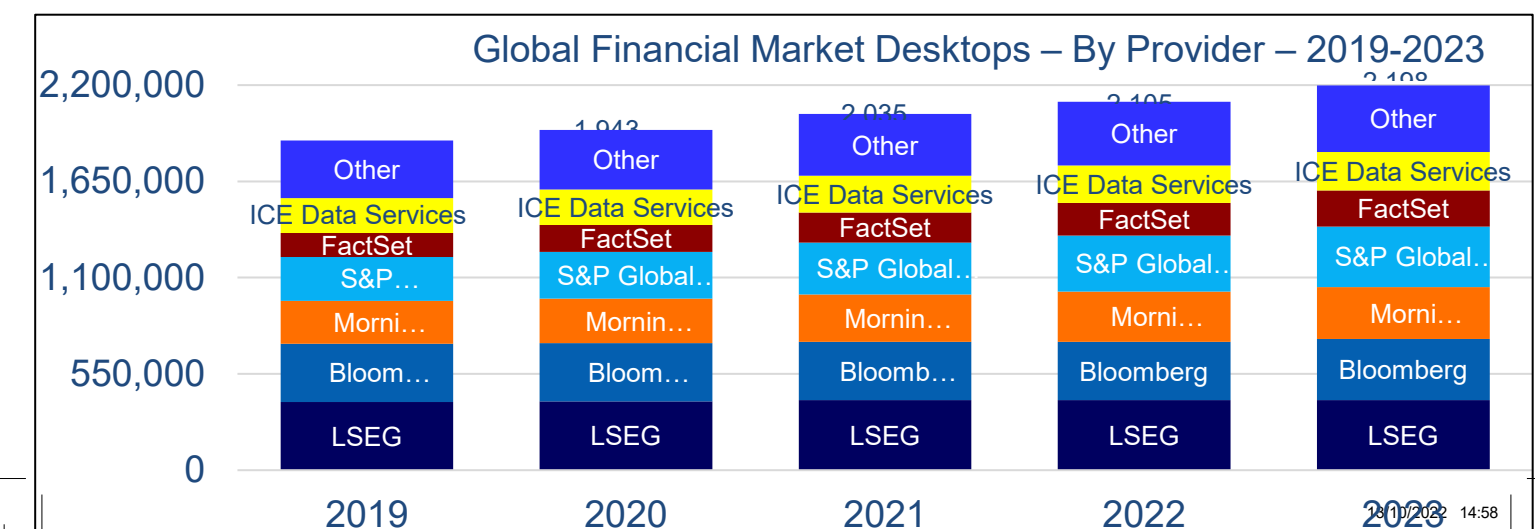
Global Business Areas 2019-2023; Global Market Share 2019-2023; Key Competitors; Global Desktop Forecast 2024

### Report Content

- Five-year market share, trend data, and growth charts plotting five-year CAGR versus Year-on-Year growth for selected leading companies and business areas.  
Business areas covered: Retail Wealth Management, Investment Management, Fixed Income Sales & Trading, Investment Banking, Equity Sales & Trading, Commodities & Energy, FX/Treasury Sales & Trading, and Corporate.
- Global desktop user count forecast for 2024 by business area with commentary and analysis.
- Regional estimates of user counts for selected leading companies, within the Americas, EMEA and Asia.
- Desktop provider profiles for the leading companies consisting of a brief summary, relevant desktop products, 2023 global user count, primary industry areas served, and how their product can be accessed - via an installed desktop application, web-based platform, or mobile application.

### Sample Findings:

- The overall financial market desktop space grew approximately x% in 2022 to total x million global users.
- The largest provider in the industry by overall market share is Company A, followed by Company B and Company C.







## BURTON TAYLOR'S Upcoming Research 3<sup>rd</sup> Quarter 2024

### 3<sup>rd</sup> Quarter 2024

#### **ESG Index Sizing 2024: Global Market Share, Market Drivers and Key Competitors**

Global ESG index revenues increased 13.8% in 2023, totaling 340 million. The new study provides an analysis of the ESG index industry with detailed reviews of leading index providers including LSEG FTSE Russell, S&P Dow Jones Indices, MSCI, ISS STOXX (Deutsche Boerse), Solactive, and Morningstar..

#### **Anti-Money Laundering/Know-Your-Customer Data & Services Global Market Share 2024**

Cybercrime and security breaches are at an all-time high, stressing financial institutions that are compelled to identify the current money laundering schemes. The vulnerability lies in the data and practices to access and transact with it. This report illustrates the size of the markets and the leading providers of data supporting AML / KYC efforts.

#### **Market Survey of Europe's Digital Operational Resilience Act (DORA)**

*Burton Taylor will present the results of a market survey of participants in the data industry, evaluating the status of progress, the areas of their greatest concern, and how they believe the DORA regulations will influence the industry.*

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# 4<sup>th</sup> Quarter 2023 Newsletter

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