



May 2024

# Mercer MPF Satisfaction Index

Monthly index covering over 2,400 respondents annually

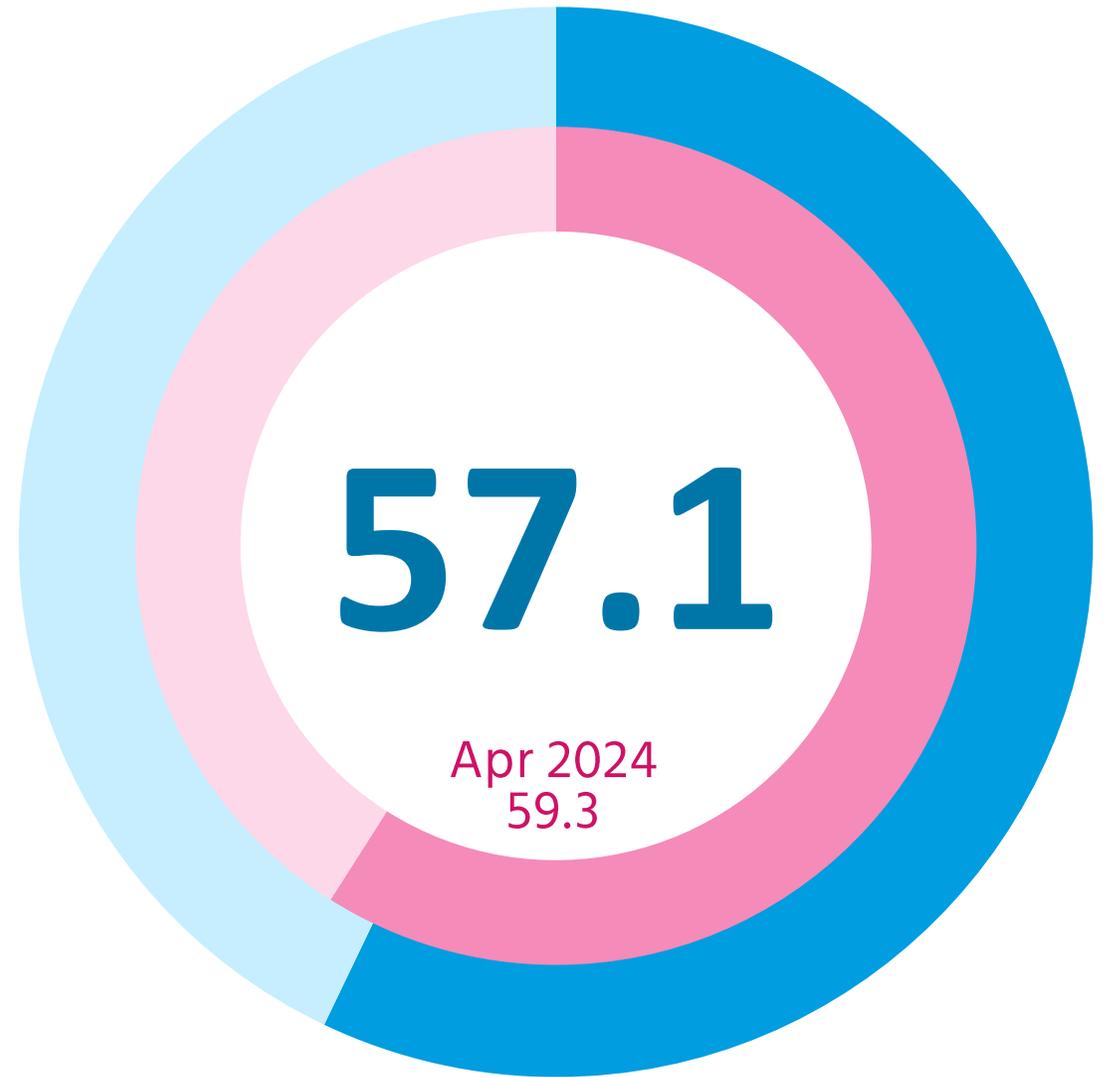
Also available online at:

<https://www.mercer.com.hk/our-thinking/wealth/mpf-satisfaction-index.html>



31 May 2024

A business of Marsh McLennan



# The More Engaged, The More Satisfied

## Time Horizon Until Retirement

Members who are closer to retirement age are more satisfied.



## Knowledge Level

Members who have better knowledge on MPF feel more satisfied.



## Advice Seeking

Members who seek advice on MPF feel more satisfied.



## Understanding of risk and return

Members who understand the risk and return of MPF investment are more satisfied.



## Top three expectations from MPF members in May 2024

Apart from good performance and low fees

1. Comprehensive fund choices: 48.3%
2. Loyalty discount: 36.5%
3. Understand customers' needs: 32.5%



### Questions?

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## In the past 12 months, where have people sought help?

We find it is more common for members to seek advice from Websites, followed by Personal Connections.

- Websites — MPFA, MPF providers and other financial websites: 39.9%
- Personal connections — family, friends and colleagues: 36.9%
- MPF agents — individuals or financial institutions: 26.1%
- No advice sought: 32.0%

*Note: The figures above do not add up to 100%, as individuals can seek advice from multiple sources.*

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