



Jul 2024

Mercer MPF Satisfaction Index

Monthly index covering over 2,400 respondents annually

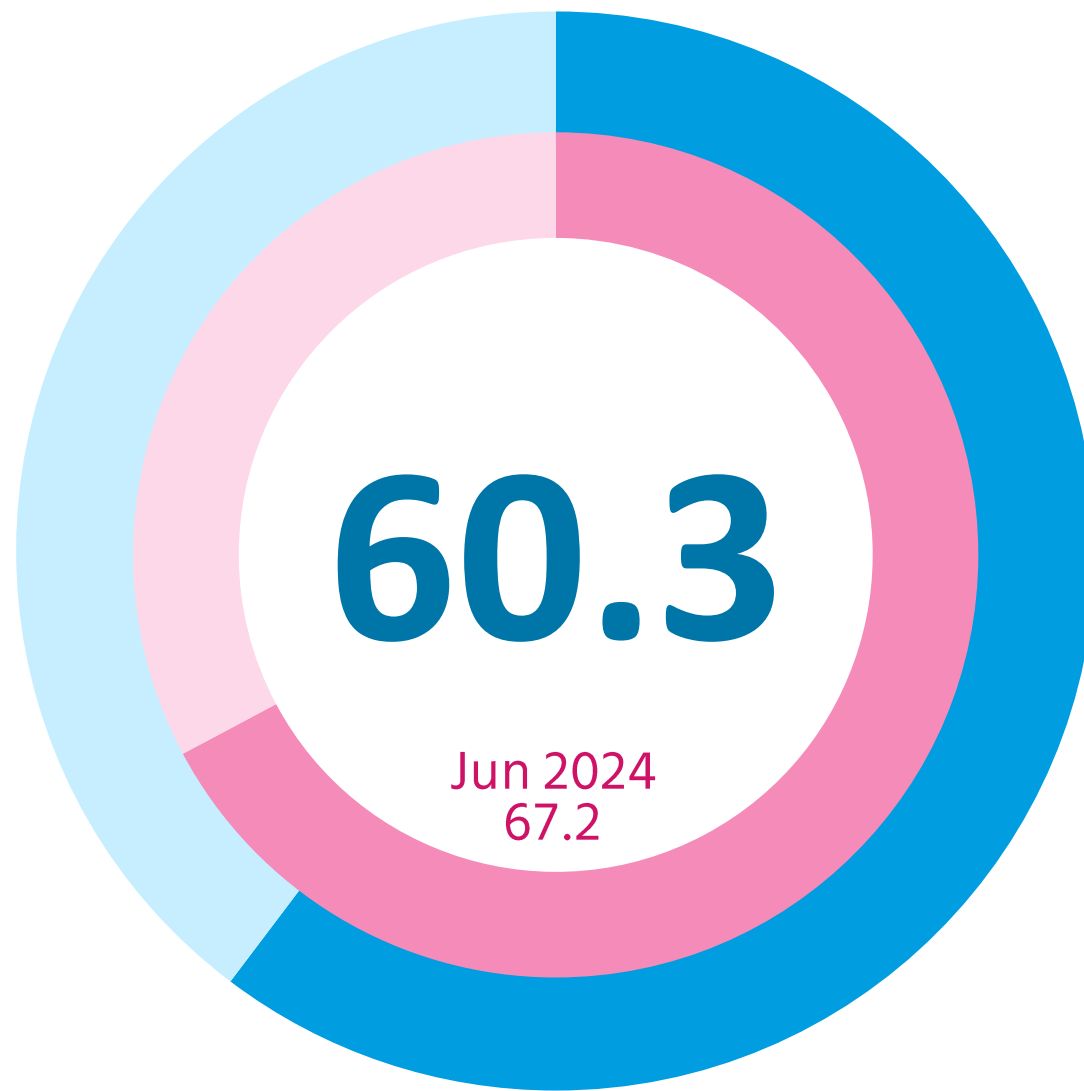
Also available online at:

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



31 July 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 July 2024

Apart from good performance and low fees

1. Understand customers' needs: 40.0%
2. Clear MPF statement: 39.0%
3. Loyalty discount and comprehensive fund choice: 37.5%



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 Personal Connections, followed by Websites.

- Personal connections — family, friends and colleagues: 37.5%
- Websites — MPFA, MPF providers and other financial websites: 34.0%
- MPF agents — individuals or financial institutions: 27.0%
- No advice sought: 35.0%

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

