

CaixaBank Wealth Management Increases 14% of Assets Under Management in 2025 through Independent Advisory and New Services

- *In the year in which the new brand was launched, CaixaBank Wealth Management increased its AUMs to €189.22 billion, 14% more than in 2024*
- *Furthermore, CaixaBank's private banking division strengthened its leadership in independent advisory services, reaching €55.17 billion in assets under management—one third of the division's total*

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CaixaBank Wealth Management, CaixaBank's private banking division, closed the 2025 financial year with growth across its key metrics, driven by strong commercial activity and a firm commitment to independent advisory services and innovation in wealth management products and services.

As of year-end 2025, CaixaBank Wealth Management manages €189.22 billion in assets, representing a 14% increase compared with 2024.

Over the year, the number of clients also grew, reaching 173,253—more than 13,000 new clients (13,635), a 9% increase. CaixaBank has the largest commercial network in the Spanish financial sector, supported by 74 dedicated Wealth Management centers and 11 exclusive Global Wealth centers distributed throughout the country.

The bank has continued strengthening its team, which at the end of 2025 consisted of 1,170 relationship managers, after incorporating 30 new professionals during the year—an increase of 3% compared to 2024. Specifically, the bank boosted the recruitment of young talent and reinforced specialist areas focused on advising LATAM clients and other international segments, such as European expatriates (through the HolaBank division) and entrepreneurs (through DayOne). Its relationship managers have an average experience of more than 15 years.

According to **Belén Martín**, Head of CaixaBank Wealth Management, “2025 has been a year of growth for the division, supported by the Group's commitment to best-in-class advisory services and cutting-edge technology that allows us to anticipate the needs of our clients. With the new CaixaBank Wealth Management, we consolidate our position at the forefront of the wealth management sector in Spain.”

Market-leading advisory services in Spain

CaixaBank Wealth Management's model is built on the strength of its advisory service. Currently, 91.2% of private banking clients receive advisory services (1.7 percentage points more than in 2024).

CaixaBank was the first bank in Spain to offer independent advisory services to private banking clients, launching in January 2018. Today, it maintains a clear leadership position with €55.17 billion in assets under management as of December 2025 (+18% vs. 2024) and 15,233 clients (+15%). In just eight years, nearly one third of CaixaBank Wealth Management's total assets are under this type of contract, demonstrating the success of this pioneering strategy in Spain.

The bank closed the year with growth in its two main independent advisory services. In Global Wealth, for clients with more than €4 million, assets reached €31.42 billion (+16.8%), while in Private Wealth (from €1 million to €4 million), assets rose by nearly 20%, reaching €23.74 billion (+19.8%).

Another growth driver has been discretionary portfolio management, a segment in which CaixaBank Wealth Management is the market leader in Spain and continues to expand year after year. In 2025, assets grew by 14% to €38.32 billion.

Innovation and advanced technology

In 2025, CaixaBank Wealth Management continued to strengthen its innovation strategy through advanced technologies. Following the launch of the GPS platform in 2024 and its rollout across the entire commercial network in 2025, the bank created the Advisory GPS service, combining agile portfolio construction with maximum advisory personalization.

Just one year after its launch, Advisory GPS has more than 2,500 clients and over €700 million in assets, one third of which is new money from other institutions—evidence of the strategy's success in achieving greater differentiation in the Spanish market.

An evolution toward a comprehensive service

During the past year, CaixaBank Private Banking evolved into CaixaBank Wealth Management (WM), a new name designed to highlight its broad vision and its positioning as a pioneering and innovative provider of products and services. The new term reflects the institution's strategic aim of offering a more comprehensive service than traditional private banking—encompassing all segments, services, and capabilities within CaixaBank's wealth management value proposition.

The bank positions itself in a context of ongoing transformation, marked by volatility, emerging technologies, new market players, and evolving client needs that demand more sophisticated solutions and holistic planning.

New services for the UHNW segment

Continuing this evolution, in 2026 CaixaBank Wealth Management launched Family Governance, a new comprehensive advisory service for business-owning families. The new value proposition enhances and expands the bank's Global Wealth offering—focused on high-net-worth clients—toward a holistic, fully personalized advisory model supported by a complete suite of services.

With this initiative, CaixaBank Wealth Management aims to become the national benchmark in advising business families, corporate governance, and next-generation preparation. Twenty-five clients have already attended next-generation training courses delivered by IE in collaboration with CaixaBank.

International recognition

In 2025, CaixaBank was named Best Private Bank in Spain for the third consecutive year at the Global Private Banking Awards by the UK magazine Euromoney, which recognizes excellence and best practices in private banking globally. CaixaBank Wealth Management has received Euromoney's top national award seven times in the past eleven years.

At the same awards, CaixaBank also received, for the second consecutive year, the titles of Best Private Bank for UHNW Clients in Spain 2025 and Best Private Bank for Family Office Services in Spain 2025.

CaixaBank Wealth Management's commitment to innovation was also recognized in 2025. PWM/The Banker (Financial Times Group) awarded the bank Best Private Bank in Innovation in Europe at the Global Private Banking Awards 2025, and Best Digital Private Bank in Europe at the Wealth Tech Awards 2025.