

CaixaBank Wealth Management surpasses €200 billion in assets under management

- **The entity's private banking division reached 193,000 clients in April, 11% more than at the end of 2025**
- **The value proposition is strengthened through technology, new specialized services, and more sophisticated client segmentation**

June 11, 2026

CaixaBank Wealth Management, the entity's private banking division, surpassed €200 billion in assets under management in April (including individual clients with more than €500,000 held with the bank). The figure (€204.19 billion) represents a 7.7% increase compared to the end of 2025. This growth in volume has been accompanied by an increase in the number of clients, which now totals 193,000 (+19,000), 11% more than in December 2025.

This growth reflects the bank's commitment to the wealth management business and the advancement of its value proposition, based on the intensive use of technology, the development of new specialized services, and more sophisticated segmentation aimed at clients with greater and more complex advisory needs.

In recent months, the entity has leveraged its experience as a pioneer in using technological capabilities for data analysis to further evolve towards more intelligent and sophisticated client segmentation, based on their wealth-related needs rather than solely on asset volume. This approach enables personalized advisory levels, scalability to new clients, and the maintenance of a high degree of specialization through dedicated relationship managers.

All of this is supported by new capabilities that CaixaBank Wealth Management has strengthened in recent months through the development of high-value, technology-driven services, particularly aimed at high-net-worth clients, such as:

- **Advisory GPS:** an [advisory service](#) that combines efficiency in portfolio construction with a high degree of personalization, adapting investment proposals to each client's needs, objectives, and risk profile. This model enhances the manager's proactivity and alignment with the entity's strategic positioning, with a clear focus on value creation and transparency.



Best Bank in Spain 2026
Best Bank in Western Europe 2026



Spain's Best Private Bank 2026
Spain's Best for Discretionary Portfolio Management 2026



World's Best Bank for Sustaining Communities 2026
Best Bank for Sustaining Communities in Western Europe 2026
Best Bank for Social Bonds in Western Europe 2026



Best Digital Private Bank in Western Europe 2026
Best Private Bank for Digital Innovation in Western Europe 2026



Most Innovative Bank in Western Europe 2026
Top Financial Innovations in Western Europe 2026



Best Bank for Consumers in Europe 2025
Best Bank for Diversity and Inclusion in Europe 2025
Best Bank in Spain 2025
Best Digital Bank in Spain 2025

- **GlobalView:** a [global aggregator](#) that enables the consolidation and analysis of a client's financial positions across different institutions in a single environment, integrating them into the bank's technological platform to provide a comprehensive view of total wealth, regardless of where it is held.
- **Family Governance:** a comprehensive [advisory service in family governance](#) and generational planning, expanding the scope of advice to key areas such as succession, family cohesion, and philanthropy.
- **Real Estate Wealth:** a real estate advisory service for high-net-worth clients, incorporating analytical, valuation, strategic consulting, and brokerage capabilities for relevant transactions.

These initiatives form a service architecture that addresses wealth from a global, financial, and non-financial perspective, supporting clients across all dimensions of their wealth.

One of the key pillars of CaixaBank Wealth Management's growth is its strong commitment to technology as a central element of its advisory model. The entity has rolled out the Global Portfolio Strategy platform across its operations. In this context, the GPS platform acts as the technological enabler of the model, integrating advanced investment analysis capabilities and providing managers with a comprehensive view of portfolios, as well as the agile generation of proposals to deliver more precise, consistent, and higher-quality advice.

A growth model based on scale and specialization

Over the past year, CaixaBank has onboarded additional clients into its Wealth Management model, extending access to its advisory capabilities to clients requiring more specialized support and increasingly diverse solutions.

The target profile of this evolution reflects a new market reality: stronger digital engagement, reduced dependence on in-person service, and increasing demand for personalized solutions and comprehensive financial planning. These are clients in key stages of wealth accumulation, with saving capacity and increasingly complex needs, requiring a more advanced and tailored advisory model.

This progress is underpinned by a growth model that combines scale, specialization, and personalization, enabling the expansion of services to a larger number of clients without compromising quality of experience.

CaixaBank Wealth Management

CaixaBank's private banking model is made up of a team of nearly 1,200 accredited specialized managers, with an average of 15 years of experience, as well as 75 exclusive private banking



centres and 11 exclusive Global Wealth centres, ensuring clients always receive close, personalized service.

This year, CaixaBank was named '**Spain's Best Private Bank**' for the fourth consecutive year at the Global Private Banking Awards by the British magazine Euromoney, which recognises excellence and best practices in private banking worldwide. CaixaBank Wealth Management has received Euromoney's top national award eight times in the past twelve years.

In addition, thanks to its commitment to digitalization and innovation, CaixaBank Wealth Management received the '**Best Digital Private Bank in Europe**' award for the third consecutive year in 2026 at the Wealth Tech Awards organised by PWM (Financial Times Group).

CaixaBank Wealth Management was also named the **Private Bank with the Best Reputation in Spain** in the 2026 Sector Study on Reputation in Asset and Wealth Management by Funds People-MERCO, an accolade it received for the second consecutive year.

CaixaBank Wealth Management's value proposition is built on a holistic view of wealth, offering different service models tailored to each client's needs. From global advisory—both independent and non-independent—to discretionary management, the entity provides access to the full range of investment and wealth planning solutions.

All of this is supported by Global Portfolio Strategy, one of the most advanced platforms on the market, which integrates assets, products, and services—securities, funds, savings insurance, and other solutions—into a comprehensive, flexible, and highly personalized management experience.

In 2026, CaixaBank Wealth Management renewed its **AENOR certification in wealth advisory**, a distinction it has held since 2018 and which represents external recognition of the strength of its management model, its high level of specialization in wealth management, and the quality of its advice and client relationships.



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