

## WHO WE ARE *A trusted partner to help you achieve your ambitions*

BNY is a global financial services company offering solutions and expertise through leading technology and platforms to support clients through the financial lifecycle. For more than 240 years, BNY has been innovating to help clients uncover new opportunities while remaining resilient through change.

### 1Q25 Global Reach and Scale

**\$53.1T**

*in assets under custody and/or administration<sup>1</sup>*

**\$2.0T**

*in assets under management<sup>2</sup>*

**\$4.8B**

*1Q25 total revenue*

**100+**

*markets serving clients*

## WHO WE SERVE *Businesses, communities and people everywhere*

We collaborate with our clients – across regions and industry segments – to continuously adapt to their evolving needs and plan together for what lies ahead. Our clients include:

Alternative Asset Managers

Corporations

Individuals & Family Offices

Asset Managers

Fintechs

Insurance Companies

Banks

Governments, Sovereigns  
& Not-For-Profits

Registered Investment Advisors

Broker-Dealers

### Breadth of Our Client Franchise<sup>3</sup>

**92%**

*of the Fortune 100 companies*

**94%**

*of the top 100 investment managers worldwide*

**95%**

*of S&P top 100 banks worldwide*

**94%**

*of top 100 largest United States retirement funds*

**98%**

*of top 50 life/health insurance companies*

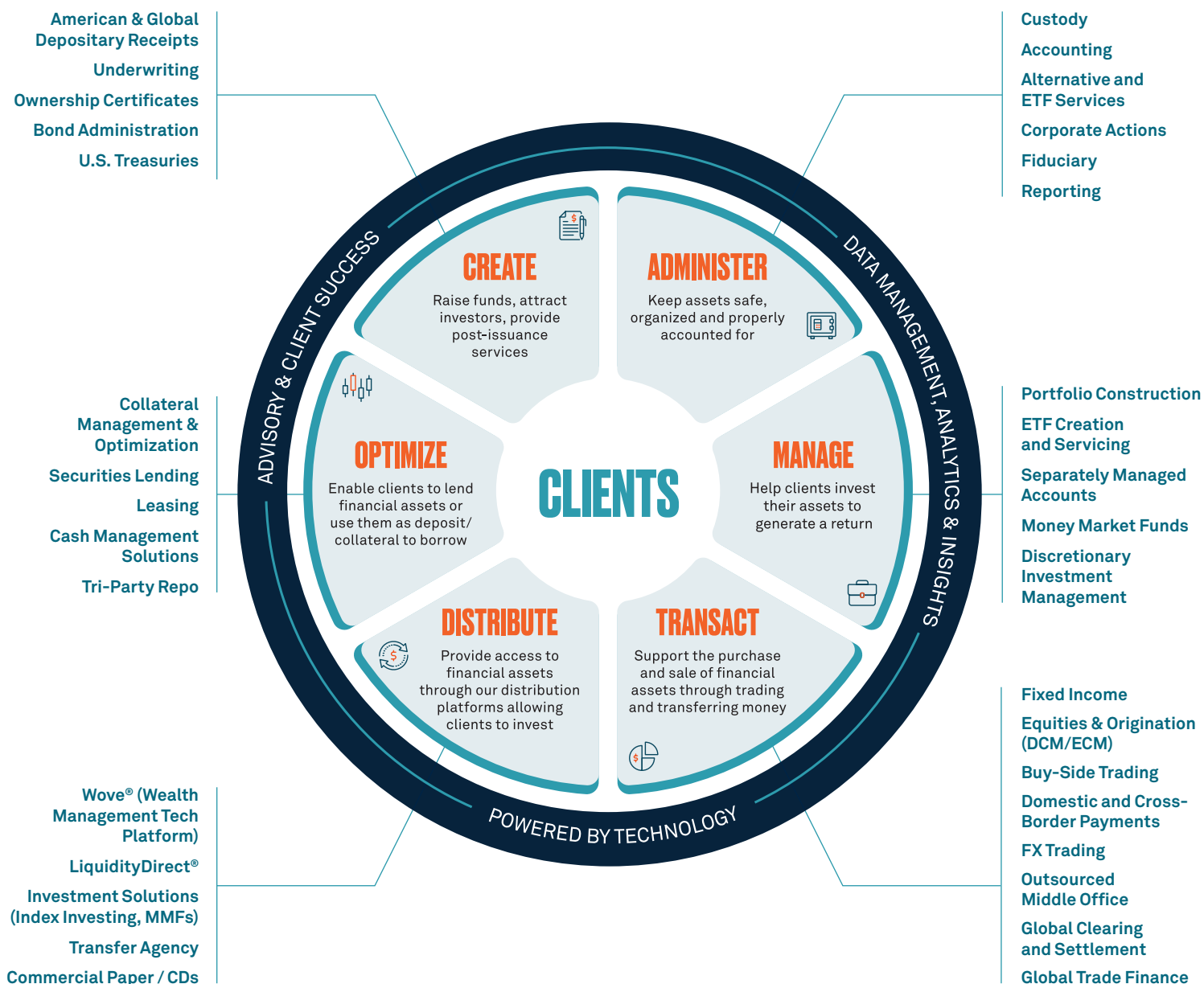


The unique role we play in the financial system – touching around one-fifth of the world’s investable assets – gives us a tremendous responsibility, and our success is critical not only to our clients’ success, but also the global economy at large. That responsibility motivates us every day.”

– Robin Vince, Chief Executive Officer

## WHAT WE DO *Creating value for our clients*

By providing solutions across the financial lifecycle, clients can benefit from streamlined operations, innovation and opportunities through our investment in new capabilities and execution at scale.



<sup>1</sup>As of March 31, 2025. Includes the AUC/A of CIBC Mellon Company, a joint venture with the Canadian Imperial Bank of Commerce, of \$1.9 trillion at March 31, 2025. Information is preliminary.

<sup>2</sup>Represents assets managed by BNY Investments and BNY Wealth as of March 31, 2025.

<sup>3</sup>**Fortune 100:** For 2024, Fortune, Time Inc. ©2024; **Investment Managers:** Pensions & Investments, worldwide institutional assets under management as of December 31, 2023, P&I Crain Communications Inc. ©2024; **Banks:** S&P Global, world's largest bank by assets\* as of December 31, 2023, ©2024 S&P Global; client penetration assessment based on positive 2024 revenue with client company or parent/holding company. \*According to S&P Global, company assets were adjusted on a best-efforts basis for pending mergers, acquisitions and divestitures as well as M&A deals that closed after the end of the reporting period through March 31, 2024. To be eligible for inclusion in pro forma adjustments, the amount of assets being transferred had to be at least \$1 billion, unless otherwise noted. Assets reported by non-U.S. dollar filers were converted to dollars using period-end exchange rates. Total assets were taken on an "as-reported" basis, and no adjustments were made to account for differing accounting standards. The majority of the banks were ranked by total assets as of December 31, 2023, and the data was compiled April 5, 2024; **Retirement Funds:** P&I:1000 largest retirement plans, February 2024. **Life/Health Insurance Companies:** AM Best, total admitted assets as of July 2023, A.M. Best Company, Inc.

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