

Finding **SWOT** Analyses by [Fitch Solutions](#)

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
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Canada Banking & Financial Services Report - Q4 2020

Fitch Solutions Country Industry Reports; London, (Fourth Quarter 2020).

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FitchSolutions Q4 2020
www.fitchsolutions.com
Canada
Banking & Financial Services Report
 Includes 10-year forecasts to 2029

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NOTE: The Competitive Landscape section of the report can also include SWOT information on the companies in this industry.

SWOT

Banking & Financial Services SWOT

SWOT Analysis

Strengths

- Leading banks are highly capitalised and enjoy large volumes of domestic and international revenues.
- Bank balance sheets are well balanced, with a high volume of client deposits.
- The insurance market, particularly the life sector, is well established, with a competitive variety of providers and expansive product range.
- Huge volume of investments is held by asset managers.
- TSX is part of the larger TMX Group, which owns a number of exchanges across the globe.
- The industry remains well capitalised owing to the increasing capital reserve requirements being set by the Office of the Superintendent of the Financial Institutions (OSFI).

Weaknesses

- Collapse in energy sector investment has dampened demand for credit, and household borrowing is also at a record high.
- As a mature market, growth in the life insurance segment will slow over the next decade.
- An estimated 90% of retail assets are held by the five largest banks, indicating lack of competition.
- Potential differences in regulation of the securities sector between different provinces/territories.
- Credit quality is likely to deteriorate over a multi-quarter time horizon but will not pose a significant risk to the sector at large.

Opportunities

- Higher investment in the manufacturing centre will drive demand for commercial loans.
- Niche non-life insurance product lines, such as cyber or drone insurance, could be developed.
- Canadian banks to further expand reach into overseas markets, particularly in Asia and Latin America.
- Presence of several stock exchanges, including the Toronto Stock Exchange (TSX), presents numerous avenues to investment.
- The signing of an MoU between TSX and Shenzhen Stock Exchange will deepen collaboration between the two groups.
- The OSFI continues to focus on boosting capital buffers in the banking sector.
- While the life market is dominated by three major providers, the non-life sector has one clear leader, though not by a major margin. In both segments, there is room for mergers and acquisitions (M&As) activity among the smaller providers.
- Despite the maturity of the market, M&A activity in the Canadian insurance sector is ongoing.

Threats

- Sharp recession in 2020 due to Covid-19 pandemic will erode demand for savings, investment and insurance services, while raising possibility of loan delinquencies.
- Overheated housing market leaves banks vulnerable to a burst property bubble.
- Rapidly growing foreign currency assets and liabilities leave Canadian banks increasingly exposed to exchange rate risk.
- Poor growth in the mining sector could lessen demand for some non-life products, such as engineering cover or liability products.
- Canada's stock exchanges could lose out to the larger exchanges in North America and Europe. In particular, Nasdaq has applied to operate an exchange in Canada.
- Banks are under pressure to fall in line with increases in the Domestic Stability Buffer introduced by the regulator.
- Canadian commercial banks' asset and loan growth to slow over the coming years, impacted by a dimming outlook for global growth and persistent trade tensions.