



Think Future: Your guide to the global investment landscape

The year has so far been characterised by slowing growth, high inflation, and policy tightening by central banks. Geopolitics and the resurgence of Covid-19 have also disrupted supply chains, causing commodity prices to surge.

So where do markets go from here?

Here's the first of our four key investment themes to guide you.



Theme 1
Focus on quality and income
to weather volatility

Fears around inflation and higher interest rates have sparked global sell-offs. Though moderate, we believe the global recovery will continue in 2022.

Our 2022 global GDP forecast is:



3.4%

Over the next 6 months, we encourage you to stay invested. Build a resilient and diverse portfolio by focusing on quality companies with strong balance sheets and high dividend payouts to generate portfolio income.



Rising interest rates are favourable to Financials.



Surging commodity prices should benefit the Energy and Materials sectors.



In fixed income, we prefer short-dated corporate bonds in Developed Markets and Emerging Markets (hard currency).

Click the button below to view the **Think Future 2022** investment outlook.

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