

2017 investment themes

Positioning portfolios for reflation

1 Managing inflation risk with financial assets

2 How tangible assets may help to manage inflation risk

3 Managing interest rate risk

4 Ride the reflation trade

Seeking superior returns in a moderate growth world

5 Technology innovation, the key to corporate success?

6 The connected consumer: A huge opportunity

7 Play the secular trend on stock markets

8 'Chindia' – extremely complementary markets

9 Benefit from the promising growth of responsible investments

10 Why favour companies with high operating leverage