

# Advisory Blog

Timely insights on the issues that matter most to advisors and their clients

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**Emerging Markets** | [Global Investing](#)  
[The India Opportunity](#)

By: [Kristian Heugh](#) | & [Anil Agarwal](#) | March 11, 2024

### KEY POINTS

1. We see strong tailwinds for growth over the next decade, including India's young population and ongoing policy reforms that support a strong infrastructure.
2. While underrepresented in equity indexes, India has consistently demonstrated stand-out performance, outperforming the S&P 500 Index over 1-, 5-, 10-, and 20-year periods.<sup>1</sup>
3. India offers a broad opportunity set for bottom-up stock picking and long-term investors.

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Head of Global Opportunity



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Director of Research Global  
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Emerging Markets  
[Indonesia's Economic Achievements and Strategic Position Are Likely to Draw Global Investors](#)

By: Steven Quattry | March 7, 2024

KEY POINTS

- 1. Indonesia is the second-fastest-growing, trillion-dollar economy in the world, with estimated average growth of 5% annually for the next five years.
- 2. Under former President Jokowi, Indonesia's inflation fell from 7.2% to 2.6% as infrastructure investments halved logistics costs and enhanced efficiency.<sup>1</sup>
- 3. Indonesia just crossed the \$5,000 GDP per capita threshold typically associated with accelerating growth in key consumption categories.

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Steven Quattry  
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