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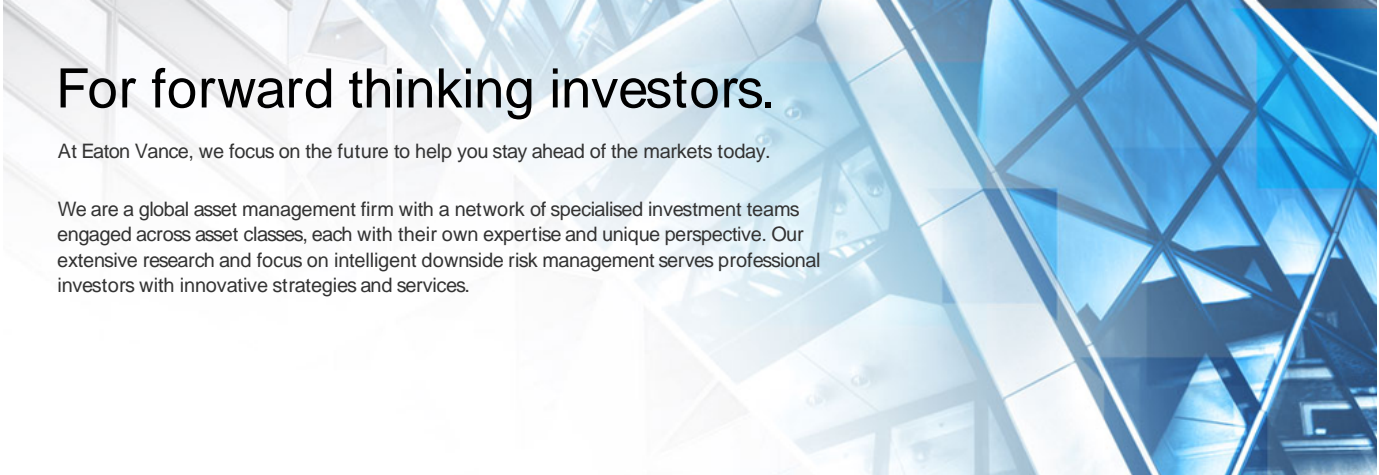
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We are a global asset management firm with a network of specialised investment teams engaged across asset classes, each with their own expertise and unique perspective. Our extensive research and focus on intelligent downside risk management serves professional investors with innovative strategies and services.





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Emerging Markets (EM) Debt in 2023, Following a Stellar

Emerging Markets (EM) debt rebounded sharply in the fourth quarter of 2022, capping a challenging year on a positive note. The surge was driven by improvements in the macro backdrop including expectations that the U.S. Federal Reserve is nearing the end of its tightening cycle and encouraging developments in China, which dramatically reversed its zero-COVID policy. Attractive valuations in the sector also drew investors.



Emerging Markets
Debt
Morgan Stanley
Investment
Management

OUTLOOK

2023 Investment Outlook: Global Listed Infrastructure

January 20, 2023

Listed Infrastructure has Potential for Resilient Earnings and Strong Cash Flow

KEY POINTS

1. Most infrastructure companies have some form of inflation protection embedded into their contract structure.
2. An interest rate tailwind for valuations is likely if long-term interest rates peak and moderate.
3. We have started to move toward a more defensively positioned portfolio, lowering exposures to energy and certain aspects of transportation (for example, freight), while increasing investments in utilities and communications.

OUTLOOK

2023 Investment Outlook: 1GT

January 13, 2023

Opportunity Meets Necessity: The Essential Case for Genuine Carbon Impact Investing

KEY POINTS

1. We believe this is an opportune time to invest in growth companies driving the transition to a lower carbon economy amid a confluence of macroeconomic, regulatory and market factors.
2. Unprecedented levels of investment and innovation in climate startups in recent years has led to a deep and maturing pipeline of highly attractive, decarbonization focused growth-stage companies.
3. Asset owners and investment managers must be willing to think creatively about traditional fund mechanisms to meaningfully address decarbonization on a global scale.

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Through our investment brands, we offer active, passive, rules-based and responsible investing strategies that go beyond traditional, mainstream strategies.

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