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All Ahead Full – Themes for 2022

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As investment managers run through the tape towards an incredibly productive 2021, many are asking what will the new year bring?

No one could have foreseen a year ago vaccine success, or the 25% equities run-up. But we have have seen remarkable private credit performance over the past 24 months, so let's highlight some key themes for the next twelve.

Activity levels. 2021 was characterized by the unleashing of pent-up private credit demand from issuers and investors. A lot was attributable to the virtues of the asset class highlighted by Covid: relative yield, less correlation and lower defaults. Will these benefits weaken from competitive pressures?

?? Read Nov 15 2021 newsletter: here

?? Chart of the Week: here *(by Natixis, ISM)*

(Any "forward-looking" information may include, among other things, projections, forecasts, estimates of market returns, and proposed or expected portfolio composition Past performance is no guarantee of future results. Investing involves risk; principal loss is possible.)