

BlueBay Podcast: Inflation – How’s it impacting the utilities sector?



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Tom Moulds, Senior Portfolio Manager, and Robert Lambert, Senior Corporate Analyst, BlueBay Asset Management, discuss the impact of inflation on the utilities sector.



Hear the podcast now by selecting this link.

7 minutes

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Tom Moulds
Senior Portfolio Manager
BlueBay Asset Management

If you missed the other 2 podcasts in the Inflation series that discuss how inflation is impacting the energy and industrials sector [click here](#)

Additionally, you will find inflation content from BlueBay’s Chief Investment Strategist, David Riley.

We ask:

1. Tom, if you could start us off with a quick summary of the inflationary environment and how it’s impacting fixed income investors.
2. Rob, your specialist focus is utilities. Could you give us an overview of how inflation is impacting the sector?
3. Which sub-sectors are seeing the most or least pricing pressure?
4. Are we likely to see any beneficiaries of rising inflation and high energy prices?
5. Alongside inflationary pressures, have ESG considerations had any pricing impacts across the utilities sector?
6. When do you expect inflation to subside within the utilities sector?
7. Tom, how are the dynamics within the utilities sector influencing your current portfolio positioning?

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