RBC Global Asset Management

BlueBay Podcast: Emerging Markets update

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Polina Kurdyavko, Head of Emerging Markets at BlueBay Asset Management, speaks with Institutional Portfolio Manager, Bashir Farukh on the current emerging markets outlook.

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7 minutes

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We asked Polina:

1. What is your view on the outlook on inflation? And what do you think higher interest rates would mean for EM fixed income markets?
2. So far, we have seen the pace of recovery globally has varied significantly. As economies reopen, which sectors or regions do you think look particularly attractive?
3. Can you give us your thoughts on the Chinese credit markets given the recent increase in regulatory action from Chinese authorities?
4. We have recently witnessed mass protests in Colombia and surprise election results in Peru and Mexico. How do you see the evolving political landscape in parts of Latin America?
5. After the president dismissed the prime minister in Tunisia, the market chatter about a possible restructuring has picked up. What outcome do you expect in the case of Tunisia?

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