



---

## **ANNUAL MEETING: OUR MARKET VIEWS AND STRATEGIC CHOICES**

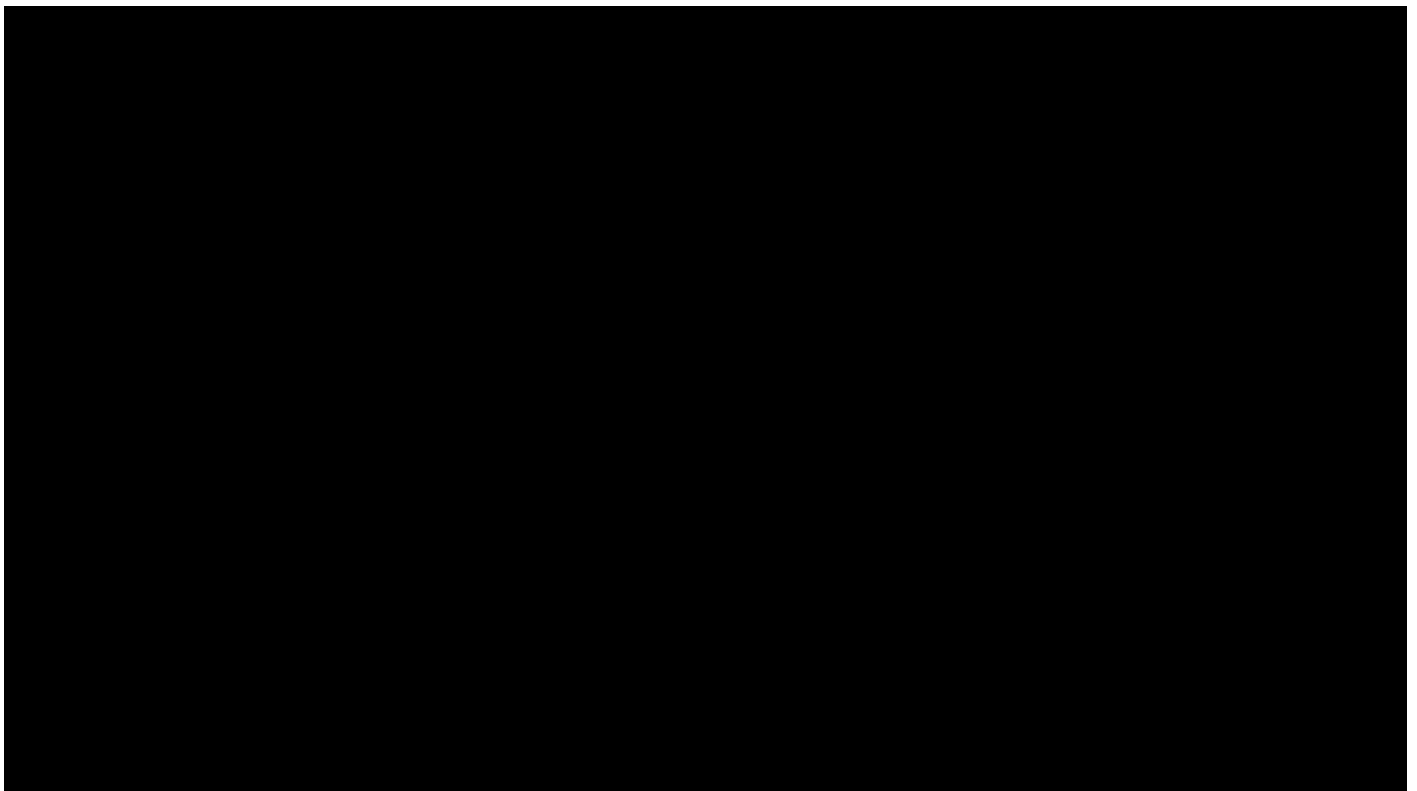
---

**During our exclusive digital event, our Investment team shared our market views as well as some of our key investment strategies. Here are the main highlights, where you can learn more on our vision and how it translates into practice.**

### **Video with Raphael Gallardo, Chief Economist**

Dive into our short- and mid-term market views alongside potential risks to this macroeconomic scenario.

---



## **Interview Frédéric Leroux, Head of Cross Asset**

Where are we headed in 2021 and is too much good news, bad news?

---

---

## **Conversation with Rose Ouahba, Head of Fixed Income & David Older, Head of Equities**

- How to find yield in the rising rate environment and capture opportunities across sectors and regions?
  - What are the winning thematics within the equity universe, especially for the post-Covid scenario?
-

**These videos are intended for professional clients. This is an advertising content.** These videos may not be reproduced, in whole or in part, without prior authorisation from the management company. It does not constitute a subscription offer, nor does it constitute investment advice. The information contained in these videos may be partial information and may be modified without prior notice. These videos are a promotional material published by Carmignac Gestion S.A., a portfolio management company approved by the Autorité des Marchés Financiers (AMF) in France, and its Luxembourg subsidiary Carmignac Gestion Luxembourg, S.A., an investment fund management company approved by the Commission de Surveillance du Secteur Financier (CSSF), pursuant to section 15 of the Luxembourg Law of 17 December 2010. This video is being distributed in the UK by Carmignac Gestion Luxembourg UK Branch (Registered in England and Wales with number FC031103, CSSF agreement of 10/06/2013). "Carmignac" is a registered trademark. "Risk Managers" is a slogan associated with the Carmignac trademark. This video does not constitute advice on any investment or arbitrage of transferable securities or any other asset management or investment product or service.

