

Global Water – Why now?

07/03/2019   

Summary

The 2008 financial crisis triggered a decade of underinvestment in water infrastructure across developed countries. The need for investment has been accruing since, and today both the ability and the desire to invest have returned.



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Summary

Thematic investing is gaining popularity as investors look to invest in a way that aligns with their interests and values. Without typically being restricted to a certain sector, region, market cap size or any benchmark, these strategies offer an attractive opportunity for active asset managers to show what they can deliver.

Key takeaways

- Thematic strategies usually focus on a secular growth trend, driven by structural shifts in technology, demographics or regulation
- Thematic strategies are not usually restricted to a benchmark or index and as a result, tend to be fundamentally active
- Despite the lack of benchmark, asset managers aim to select themes that will outperform the broader market
- Investors may be attracted to thematic products due to an emotional involvement with the theme

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