

Video Transcript

Top 10 Ideas for H2 2026 with Jonathan Sparks, UK CIO, HSBC Private Bank and Premier Wealth

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I'm Jonathan Sparks. I'm the UK CIO for the Private Bank and Premier Wealth.

Now, we turned the chapter on the first half of the year moving into the second, so this means it's time to review our Top 10 Investment Ideas. As you'd expect, AI touches on a number of these ideas, but we're doing this more through the infrastructure build-out and also the adopters, so those companies that can turn that productivity opportunity into profits.

It's not just the US as well. We're looking at Asia, and we do this through Asia's Digital Infrastructure Champions. Now, there's also some concern over the concentration risk, particularly in the US, so we tackle this by calling out structured investments. This is because you can change your risk-return profile and also there's some downside protection there as well. Active management as well is another way of doing this.

Also, there is a nod to inflation risk and we do this through real assets. So, lots of opportunities actually to increase diversification. There's also some yield plays, and we really do this through investment grade, try not to take too much duration risk, and then also looking at some of the income opportunities in the emerging markets.

Finally, a couple of ideas, they're a bit more niche. One of them is looking at healthcare, what we call the picks and shovels. So, this is looking at manufacturing and diagnostics industry. So, there's some really good growth opportunities there, and we also address the big pickup in IPOs and M&A activity and sift through some of the winners in this kind of more vibrant corporate environment that we now have.

Anyway, if you want to see more of these ideas, get a bit more detail, please check out the report.

Thank you.