



(UBS)

# VIDEO: Emerging markets in the roaring 20s

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**We titled our recent Year Ahead 2025 report the “Roaring 20s: The Next Stage,” as we perceive today’s world to be reminiscent of the 1920s. At their core, both decades are characterized by strong economic and financial market performance, alongside growing political and geopolitical tensions.**

For emerging markets, this backdrop presents both opportunities and challenges. A broadening of global GDP growth is supporting economic activity differentials in favor of emerging markets. Many companies from the emerging world are at the forefront of the ongoing AI transformation, and we believe countries such as India and Brazil stand to benefit from the shifting geopolitical landscape if they respond correctly.

[Watch this short video](#) where Alejo Czerwonko, Chief Investment Officer for Emerging Markets, discusses these topics and much more.

For more, see the Regional View on Emerging Markets: [Emerging markets in the roaring 20s](#), published 2 December 2024.

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