

Made in China

How Current Events with China May Impact Markets, Investments and Globalization

The current events with China have the potential to create significant challenges for the globalization of markets and economies, but it is too early to say for sure whether they will derail it completely.

China has become an integral part of the global economy and supply chain, and any disruptions to trade and investment between China and the rest of the world could have far-reaching consequences. The ongoing trade tensions between China and the United States, for example, have already had a significant impact on global trade and investment flows.

In addition to trade tensions, there are other issues that could potentially impact the globalization of markets and economies. For example, concerns about intellectual property theft and cybersecurity risks could lead to increased protectionism and restrictions on cross-border investment and trade. Political instability and rising nationalism in certain countries could also pose a threat to globalization.

That said, it is important to note that globalization is a complex and multifaceted phenomenon that is driven by a range of economic, social, and technological factors. While the current events with China may create headwinds for globalization, it is unlikely to be completely derailed in the long run. In fact, many experts believe that globalization is likely to continue, albeit with some adjustments and changes in the way that it operates. For example, we may reduce building the number of new factories in China, and simultaneously increase our business ties with India, Mexico, Latin America, or other Asian countries.

When it comes to Investing in China and other Emerging and Developed Nations there are other factors to consider as well. Considerations include Currency Exchange rates, Credit availability, and the Health and Political Stability of the Sovereign Nations. Overall, it is difficult to predict with certainty, but it is our view that post Pandemic the International Markets and in particular the Emerging International Markets offer compelling opportunities for some Investors with higher risk tolerance and who have a longer time horizon who are interested in Income and Capital Appreciation potential.
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