Quarterly Investment Perspective Q3 2026

We are pleased to share the latest edition of our Quarterly Investment Perspective, providing our outlook for the third quarter of 2026.

This quarter's theme, "The Return of Balance," explores how the investment landscape is evolving. After several years in which market returns were driven by a narrow group of companies, we are seeing broader participation across sectors, regions and asset classes. We believe this is creating a healthier environment for long-term investors and reinforcing the value of diversification and disciplined portfolio management.

In this edition, TAM Europe's Chief Investment Officer, Eric Silvestre, discusses the key economic and market developments shaping our outlook, the opportunities we see across global markets, and how our portfolios remain positioned to navigate an increasingly balanced investment environment.

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