



# Market Thinking For 2023 with Angelo Robles and Mark Tinker

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## Watch the video

<https://youtu.be/fyWJ0Hw9NyM>

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Accordia Group is delighted to welcome the host of the global investment newsletter, Market Thinking, to an interview with Family Office Association Founder, Angelo Robles. Mark is uniquely experienced as a global strategist and active investor with intimate knowledge of developed and emerging markets, and particularly China. In his role at Market Thinking, Mark seeks to get inside the market narrative to identify which of the short-term traders, asset allocators or long term investors are driving the market dynamics at any given time, in order to highlight areas of both relative and absolute return in a broad array of asset classes.

### **As we move into 2023, Mark shares his views on some of the following topics:**

- How is the narrative changing as we enter 2023 and is 60/40 forever dead?
- Is the dollar losing its global dominance, and how to prepare for such an eventuality?
- Is China committed to a market economy?
- How will demographic headwinds influence Chinese market structures?
- Which parts of the Chinese economy offer returns commensurate with the risks?
- Why is the case for European banks so compelling, and “different” this time around?
- Are you a believer in the forthcoming commodity supercycle?
- Is a 15-20% allocation to real-estate a valid investment approach for a balanced family office?
- Which parts of the fixed income market can helpfully contribute to a balanced portfolio?
- What would you recommend as an optimal asset allocation for a family office in 2023?