2026 Midyear Credit Outlook: Adoption, Financing and Investing in the Age of AI

Apollo · 2026-08-09 · English original

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AI is reshaping credit markets in ways that demand a more thoughtful approach to investing.

Public markets are being stretched by record financing needs, spreads leave little room for error and traditional notions of diversification are being tested.

Credit fundamentals remain resilient, but the margin for error is narrowing.

AI adoption is creating a new divide across credit markets.

Financing the AI buildout has become a market-capacity problem.

Private investment grade credit will be essential to closing the AI funding gap.

AI factor risk is changing what diversification means.

Private credit can help to finance business growth and innovation, support household prosperity and fuel the real economy.

Source: https://www.apollo.com/insights-news/insights/2026/08/2026-midyear-credit-outlook