Templeton Global Investments Insights

Franklin Templeton · 2026-08-18 · English original

AI in Emerging Asia: A Dynamic Ecosystem

From hyperscalers to chip producers and infrastructure enablers, companies across emerging Asia anchor a vibrant ecosystem that investors should consider as they seek exposure to the AI theme.

European Exceptionalism on Sale

Why Europe deserves another look. Global businesses with European listings, a more pragmatic policy backdrop and growing corporate interest are creating selective opportunities for investors willing to look beyond the region’s headline discount.

Global Equity Pulse: AI's Next Phase—Investors Are Changing Where They Invest

The first phase of the AI boom rewarded companies that supplied the hardware. The next phase may favor companies that can turn AI investment into lasting profits. Find out more from Templeton Global Investments.

Climate Change and AI: From Power Demand to Productivity

Templeton Global Investments suggests AI is driving demand for climate infrastructure while improving efficiency, creating broad investment opportunities across energy, grids, cooling and industrial supply chains.

Global Equity Pulse: Banks—A Penny Saved

In this month’s issue, the outlook for global banks is starting to improve following a few difficult years. Templeton Global Investments offers its analysis of this and other market trends.

Global Equity Pulse: Health care—positioning for a potential recovery

In this month’s Global Equity Pulse, Templeton Global Investments makes the case for a recovery in the health care sector.

Global Equity Pulse: Conflict and opportunity

In this month’s Global Equity Pulse, Templeton Global Investments examines undervalued opportunities as a wave of rearmament progresses at a rapid pace.

Global Equity Pulse: A closer look at the energy sector

With oil prices and energy stocks at higher level, how can investors navigate a sector driven by geopolitics and volatility? This month’s Global Equity Pulse reveals why looking beyond commodity prices to company fundamentals may be the key to unlocking value in today's uncertain energy landscape.

Value is not a low multiple: A broader framework for identifying undervalued businesses

Value investing isn't about low multiples and weak companies, according to Templeton Global Investments. It's about finding misalignments between price and longer-term potential. This article identifies five types of undervaluations, each with its own catalyst for unlocking potential returns.

Global Equity Pulse: Ramping up on consumer staples

Templeton Global Investments is increasing its focus on opportunities in the consumer staples sector, where compelling valuations, attractive dividends and potential earnings recovery beckon.

US/Iran conflict: global equity impact

For markets, the swing factor in “Operation Epic Fury” is whether escalation stays military-to-military or migrates into significant and prolonged energy + logistics disruption, according to Templeton Global Investments.

Japan 2026 outlook

Japan is undertaking its most significant economic and corporate transformation in a generation. The likely earnings tailwind from economic normalization combined with shareholder return enhancement through corporate reforms anchor our bright outlook for 2026 and beyond.

Global Equity Pulse: Japan’s compelling case—an updated view

Templeton Global Investments maintains its conviction on Japanese equities in 2026, as evidence of economic normalization and broadening corporate reforms continues to build.

Global Equity Pulse: Cheaper oil part of constructive 2026 outlook

Lower oil prices, earnings growth and diverse opportunities in 2026: Templeton Global Investments explores these key themes in its latest Global Equity Pulse.

Climate change outlook 2026

After two years of elections and policy upheaval, Templeton Global Investments expects 2026 to bring a period of greater stability, as the policy, macro and industry conditions now settle into a clearer framework.

AI in Emerging Asia: A Dynamic Ecosystem

Emerging Asia has taken center stage in the AI revolution. From hyperscalers to chip producers and infrastructure enablers, companies across the region anchor a vibrant ecosystem with myriad investment opportunities. Find out more from Templeton Global Investments.

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Emerging Markets Insights: Opportunities in China’s Consumer Market

This month’s Emerging Markets Insights looks into opportunities among consumer market leaders amid a weak economic environment in China.

Why Now Emerging Markets

Moving from the edge to the centre of the global economy. Templeton Global Investments suggests emerging markets are driving global growth but remains overlooked by investors.

Saudi Arabia Vision 2030: 10 years of progress

Templeton Global Investments believes Saudi Arabia’s transformation, driven by the Kingdom’s Vision 2030 framework, could provide global investors with a unique investment opportunity.

Emerging Markets Insights: Looking Beyond Energy Prices

Falling energy prices, a pivot toward semiconductors and corporate governance reform are three things to watch in this month’s Emerging Markets Insights.

India: Structural attractions intact despite recent uncertainty

The US/Iran conflict has unnerved some investors in Indian equities, with many concerned about the risks higher energy prices pose to earnings, inflation and sentiment. However, investors should keep in mind that India’s macroeconomic vulnerability is lower than in past cycles. Templeton Global Investments examines the investment case.

Emerging Markets Insights: Evolving investment narratives in a resilient market

The latest Emerging Markets Insights discusses companies across various sectors that have expressed cautious optimism for the second half of 2026 despite ongoing geopolitical pressures and higher input costs. Templeton Global Investments highlight what they observed at a recently attended summit.

APAC Investing: A pan-regional approach

Templeton Global Investments makes the case for APAC investing, with a pan-regional approach that encapsulates the entire spectrum of dynamic sectors and structural themes.

Emerging Markets Insights: Looking beyond energy prices

US/Iran conflict, Trump-Xi Summit and the re-routing of goods via land are three things we’re watching in this month’s Emerging Markets Insights.

Emerging markets—leading not emerging

Emerging markets are continuing to evolve and change. They are transitioning from the world’s manufacturing hub to a global innovation hub.

Emerging markets at a capital allocation inflection point?

Given the combined weight of these markets within EM portfolios, Templeton Global Investments believe incremental improvements in capital discipline could have a meaningful impact on aggregate index-level earnings quality.

Emerging Markets Insights: South Korea insights and first quarter market review

In this latest Emerging Markets Insights, Templeton Global Investments summarizes the findings from their portfolio managers' recent visit to South Korea and presents its market review for the first quarter of 2026.

Emerging Markets Insights: Conflict in Iran and falling tariffs

Operation Epic Fury and the impact on the equity risk premium and inflation risks, in addition to US tariffs the China National People's Congress are three things to watch in this month's Emerging Markets Insights.

Emerging Markets Insights: China's evolving consumer landscape

China's Spring Festival, Korean semiconductors and emerging market earnings are the three things Templeton Global Investments analyses in this month's Emerging Markets Insights.

Find out more

Our clients benefit from Templeton Global Investments decades of experience navigating changing markets, and from our investment professionals embedded in global markets with extensive knowledge of local industries and sectors.

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