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CEEMEA Economics Quarterly

CEEMEA economies are shifting up a gear. With the COVID-19 shock fading and commodities gaining, we've raised our growth forecasts. HSBC's Simon Williams and team explain why we are more positive on the region's recovery prospects.

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Climate Investment Update

Extreme weather dominated June, as the impact of climate change continued to bite. Lucy Acton, HSBC ESG analyst, says that given the devastating implications, the time to act is now.

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The EM global infrastructure cornucopia

Increased spending on global infrastructure, traditional and green, will drive emerging markets both directly and indirectly through higher metal prices, says HSBC's John Lomax.

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China Inside Out

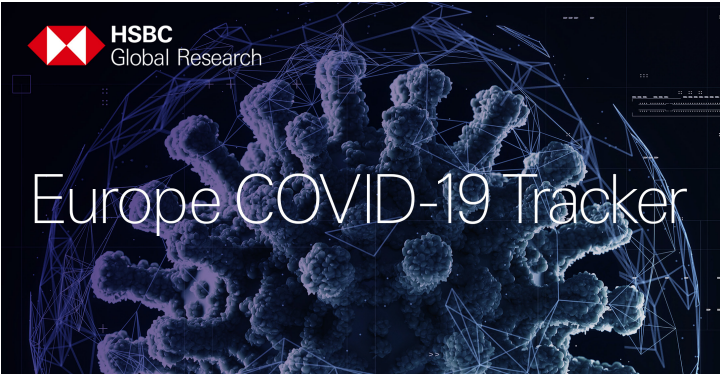
Chinese universities are set to produce more than 50m graduates in the next five years. This will not only limit wage inflation but also facilitate innovation and should ultimately help companies to keep prices low, say HSBC's Qu Hongbin and Erin Xin.

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Past the peak?

HSBC's James Pomeroy looks at the latest PMIs and argues that while the global economy is still recovering, the pace may be cooling outside of Europe. Intense price pressures remain, particularly in the US.

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Europe COVID-19 tracker

As the UK prepares to lift most restrictions, concerns regarding the Delta variant persist. But HSBC's Fabio Balboni says that improving labour markets and confidence bode well for Europe.

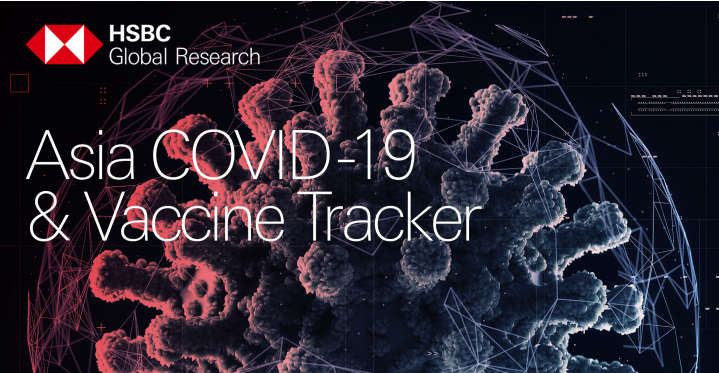
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Asia COVID-19 & Vaccine Tracker

As COVID-19 cases continue to surge across Asia, more authorities have re-imposed restrictions or even lockdowns. This has added to the pressure to ramp up vaccine procurement and roll-out across the region, says HSBC's Yun Li.

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The Macro Viewpoint

ECB Strategy Review, European demographics, USD, EM update

In this edition we assess the policy changes from the ECB's strategy review, Europe's difficult demographic future, what's next for the dollar and the outlook for emerging market assets.

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