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## Under the Banyan Tree – Asia in context

A new podcast from Fred Neumann  
& Herald van der Linde

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### Trade, inflation & demand

Goods trade flows remain strong but growth may start to slow as demand for pandemic-related products normalises, says HSBC Trade Economist Shanella Rajanayagam.

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### China COVID-19 tracker

With daily new COVID-19 cases in mainland China averaging over 800 recently, the city of Shenzhen has introduced new containment measures.

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### The Major bond letter

HSBC's Steven Major, Global Head of Fixed Income Research, explains misleading signals from the yield curve and, when looking for a better signal, the spread to watch.

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### Feeling the heat

Tourism is picking up in some parts of the world as lockdown restrictions lift. But high inflation may weigh on international travel demand, and global food and energy trade remains disrupted, according to HSBC's latest trade and policy tracker.

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### Climate Investment Update

Thursday 28 July was "Earth Overshoot Day" – the day by which we fully spent the planet's ability to regenerate its resources. We are on track to use the equivalent of 1.75 Earths in 2022. It's a return to the pre-pandemic trajectory of the date coming earlier each year, say HSBC's Wai-Shin Chan and team.

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## The Macro Viewpoint

Fed tightening, China's property stress, Europe's gas worries

We look at what's next for the Fed, new challenges facing China's property markets and the potential pain from natural gas rationing in Europe.

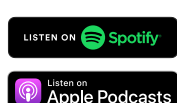
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