

# *Introduction au Bloc 1*

## Le Monde a changé

Quels sont les perspectives économiques à venir?

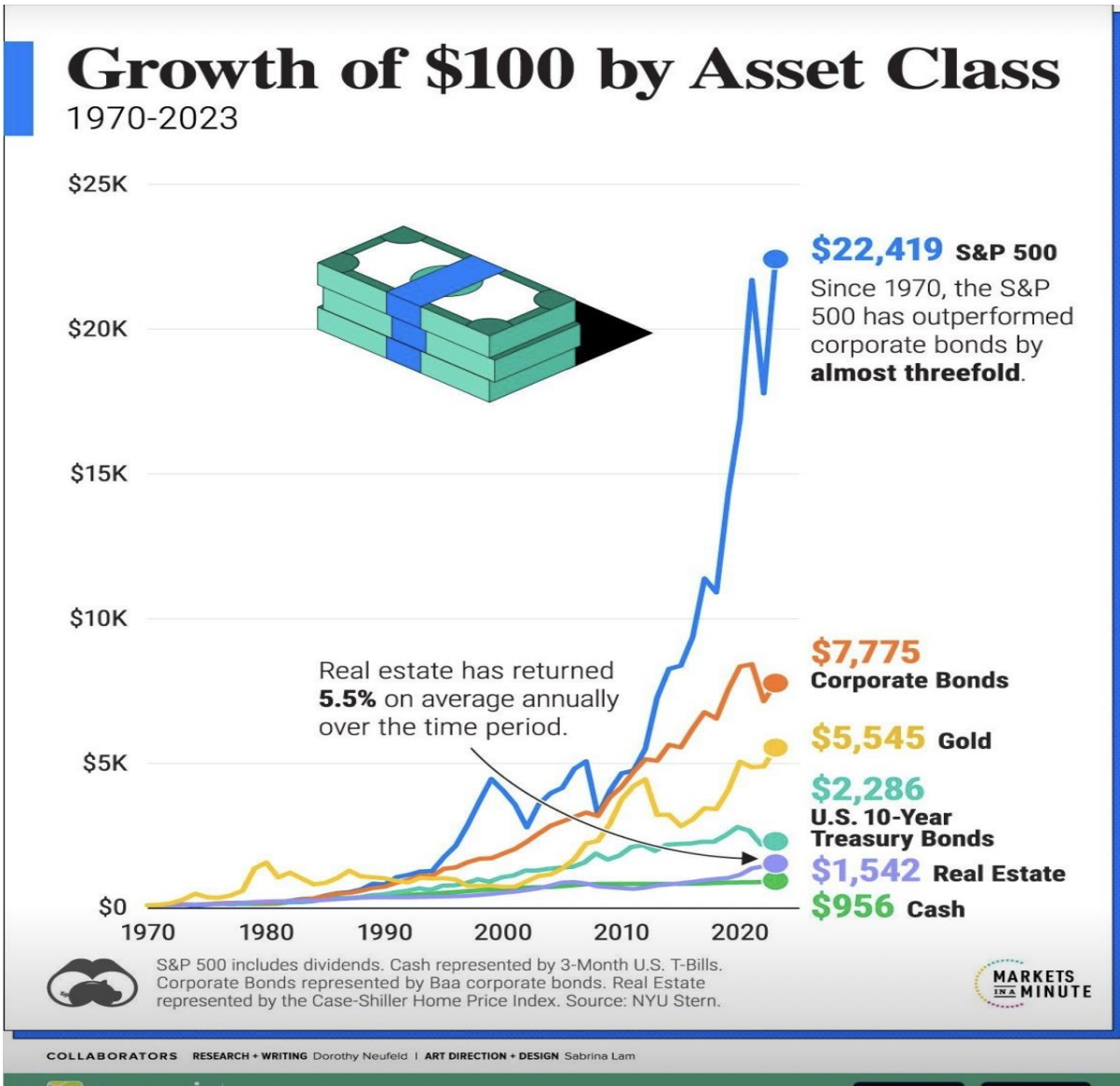
Grand colloque de l'IGOPP

Lundi le 15 Avril 2024

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Modérateur & Économiste

Fin de la guerre froide → Stabilité ↑ Globalisation ↑ Profits ↑ Wall Street

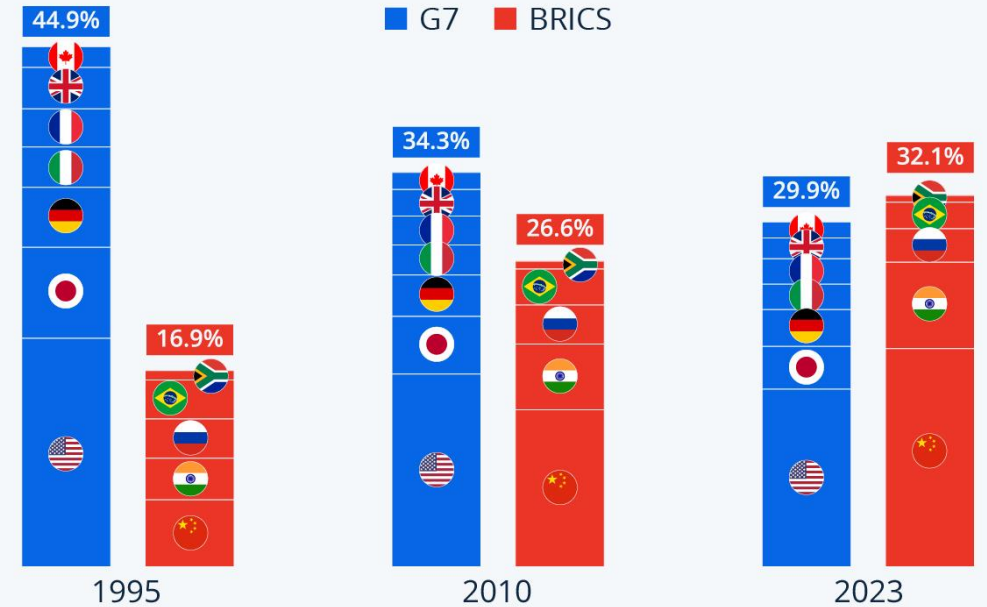


# Nouvel ordre mondial: ↑ BRICS ↑ Fragmentation ↓ Rôle du USD



## The Rise of the BRICS

G7 and BRICS countries' share of global GDP at purchasing power parity



2023 data based on IMF estimates as of April 2023

Source: IMF World Economic Outlook



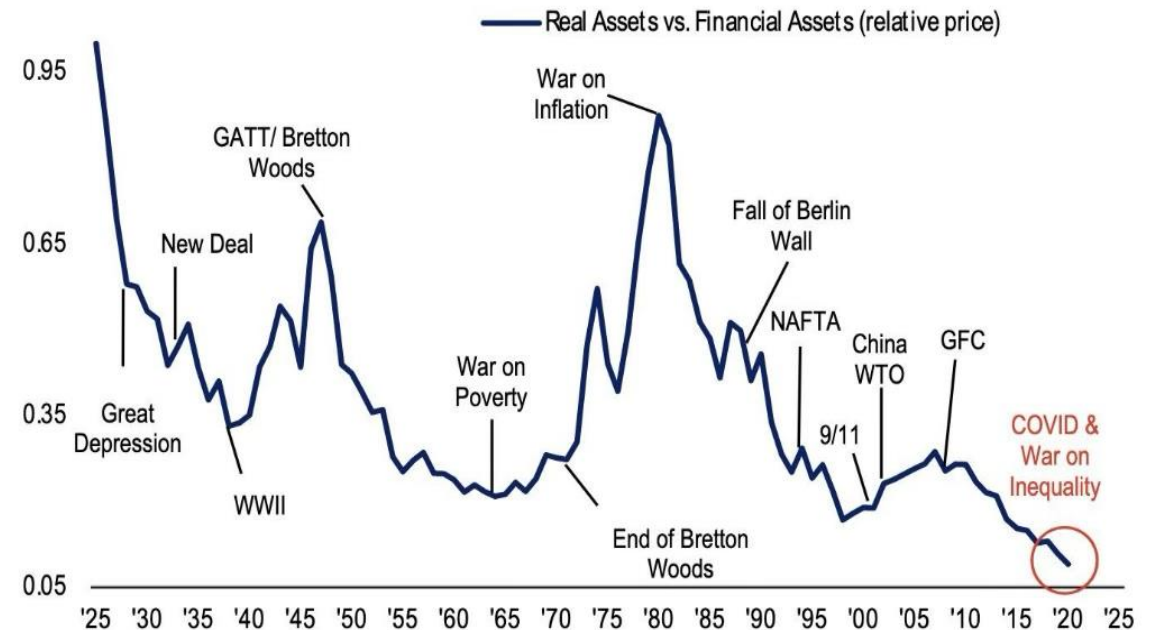
# Contexte géopolitique ➡ Chaines d'approvisionnement ➡ Inflation

## Q: Assisterons-nous à une hausse de la prime de risque?



### Exhibit 1: All-time lows...real assets relative to financial assets since 1925

Real Assets (Commodities, Real Estate, Collectibles) vs. Financial Assets (Large Cap Stocks, Long-term Govt Bonds) since 1925



Source: BofA Global Investment Strategy, Global Financial Data, Bloomberg, USDA, Savills, Shiller, ONS, Spaenjers, Historic Auto Group.

Note: Real Assets (Commodities, Real Estate, Collectibles) vs. Financial Assets (Large Cap Stocks, Long-term Govt. Bonds)

La table est mise!  
Place à nos conférenciers