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Global equities: How to approach value investing in 2024

By Perpetual Asset Management

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Cory Martin, portfolio manager of the Barrow Hanley Global Share Fund (ASX: GLOB), joins Sara Allen at Livewire to discuss the team's outlook, market dislocations and growth trends, and why we may be at start of the next value cycle.

- 0:25 - Why value in the growth v value debate
- 1:37 - Where we are in the market cycle
- 2:44 - Market outlook
- 4:35 - Taking advantage of market dislocations
- 6:02 - Positioning
- 6:40 - Value opportunities in financials
- 8:03 - Opportunities in the insurance space
- 8:40 - How to approach AI from a value perspective
- 11:31 - Most exciting and most concerning trends
- 14:44 - The timing for a recession
- 16:05 - Cory Martin's view from the top

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