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Dec 22 2025 Commoditiesare set to play a more prominent role in portfolios in2026

Our forecasts point to attractive returns supported by supply demand imbalances heightened geopolitical risks and long term trends like the globalenergytransition Dec 22 2025 Goldman Sachs Research s cyclical macro base case of sturdy global GDP growth and 50 basis points of Fed rate cuts in2026is again supportive of top downcommodityreturns

The US China AI and geopolitical power race and globalenergysupply waves drive our analysts key convictions We expect the global economy to accelerate during2026. Coupled with Fed easing and a weaker dollar we expect this to favour cyclicalassets

We reduce government bonds and investment grade credit to slightly Underweight within our ModelAssetAllocation while raising high yield to Neutral Nov 17 2025 Drawing on insights fromEquity Manager and Behavioral research analysts worldwide thisOutlookdistills Morningstars thinking on how to navigate opportunity and risk across every majorassetclassin2026

Markets are unpredictable and the geopolitical and tariff uncertainty of 2025 showed just how quickly forecasts can shift After weathering the 2025 policy storm 2026should be another year of U.S

economic resilience continuing to support riskassetslike stocks and corporate credit Dec 12 2025 Energycommoditiesenter2026at an interesting crossroads. On one hand oil and gas markets have abundant supply and somewhat softer pricing

On the other hand the ongoingenergytransition is accelerating investment in newenergysources Dec 2 2025 Energycommodities however face headwinds from oversupply and weak demand with Brent crude projected to trade near $60 per barrel

Investors are advised to hedge against tail risks through disciplined risk management and explicit hedging strategies Nov 20 2025 Investors will need to be flexible and selective in2026as markets adapt to greater economic fragmentation around the world

Bonds are poised to benefit from rate cuts particularly in the US and Europe but remain vulnerable to rising budget deficits

Credit is supported by the economic and policy backdrop Nov 14 2025 We expect global GDP growth to ease slightly in2026 due to tariffs and the fading post tariff front loading of demand

This slowdown does not signal a global recession but it represents a soft patch

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