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Barrow Hanley: Why emerging markets deserve a second look

By Perpetual Asset Management

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Emerging markets are growing faster than developed economies but remain under owned and, in many cases, attractively valued. Barrow Hanley's David Feygenson explains why EM deserves a second look

In this video podcast, Barrow Hanley's David Feygenson discusses why the opportunity set in EM is broader than many investors realise — spanning Asia's tech leaders, Taiwan's semiconductor supply chain, undervalued ASEAN markets, and select opportunities across Latin America, the Middle East and Eastern Europe.

Feygenson explores whether investors are being compensated for headline risks, where valuation disconnects are most compelling, and why EM should not be viewed as one homogeneous bet.

Watch the full video podcast to learn more

About Barrow Hanley's emerging markets investment strategy

The Barrow Hanley Emerging Markets Fund aims to provide long-term capital growth through investment in emerging market shares and to outperform the MSCI Emerging Markets Net Total Return Index (AUD) (before fees and taxes) over a full market cycle, typically five years.

The team strives to achieve the fund's objectives by adopting a value-oriented, bottom-up investment process focused on in-depth fundamental research.

Barrow Hanley seeks to identify companies that trade below their intrinsic value for reasons they can identify, believe are temporary and have a clearly identified path to achieving fair value.

Learn more about Barrow Hanley Emerging Markets Fund

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