



The Future of Commodities in a World of Flux

InDAY Manager and Family Office Showcase Day

Sydney 2024

Arthur Fan, APAC CEO, Marex

The Future of Commodities in a World in Flux

- New Long-Term Demand Drivers
- Rising Trade and Geopolitical Tensions
- Intensifying Tech Race
- Impact of US Elections
- Increasing Complexity
- Fireside Chat – Profiting From a World in Transition

New Long-Term Demand Drivers

- China no longer the biggest determinant.
- Energy transition, AI now pre-eminent.
- Major shifts in demographics.



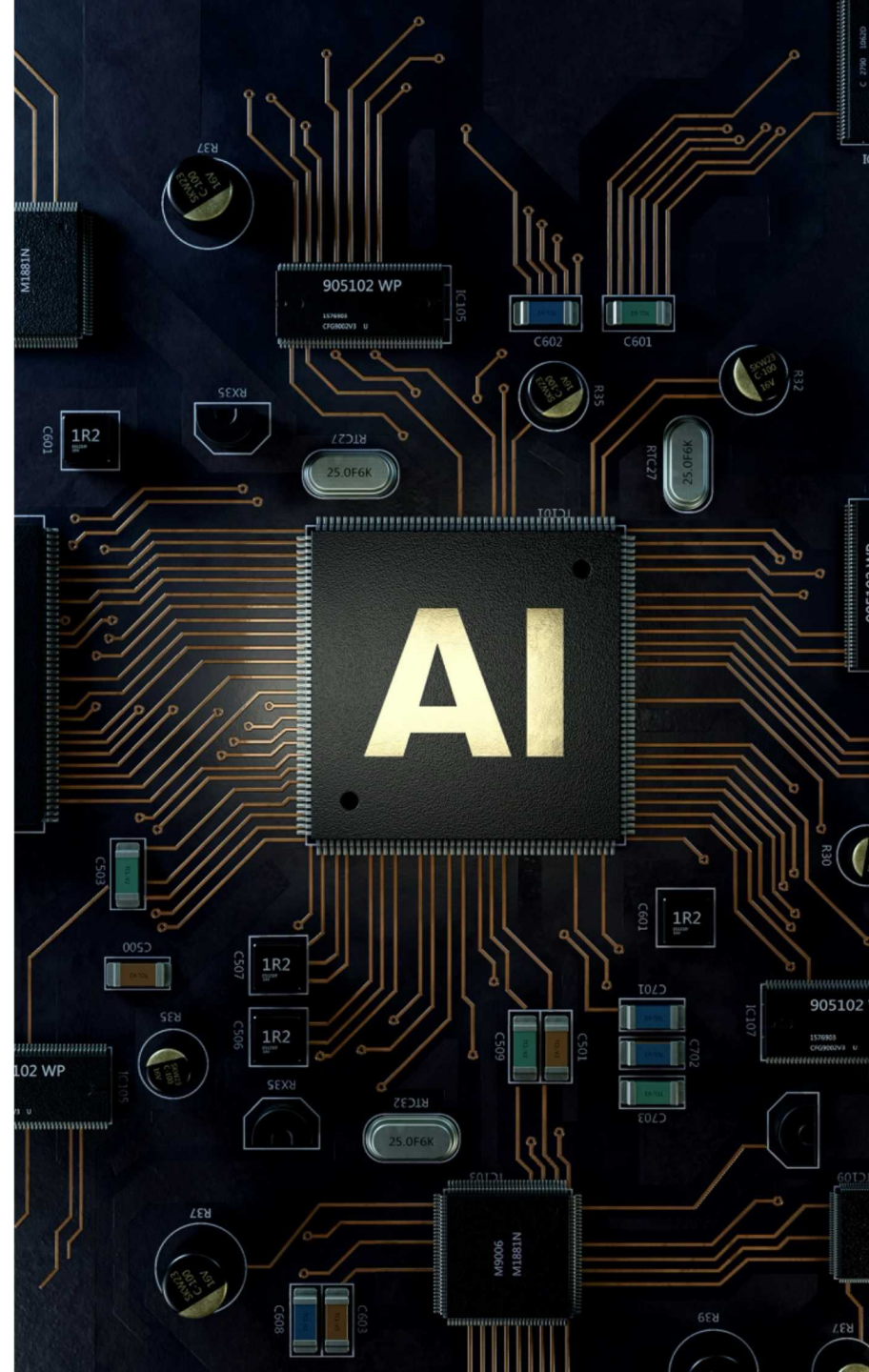
Rising Trade and Geopolitical Tensions

- New barriers to trade emerging.
- Risk of conflict spreading to new theatres.
- Path to Net Zero under threat?



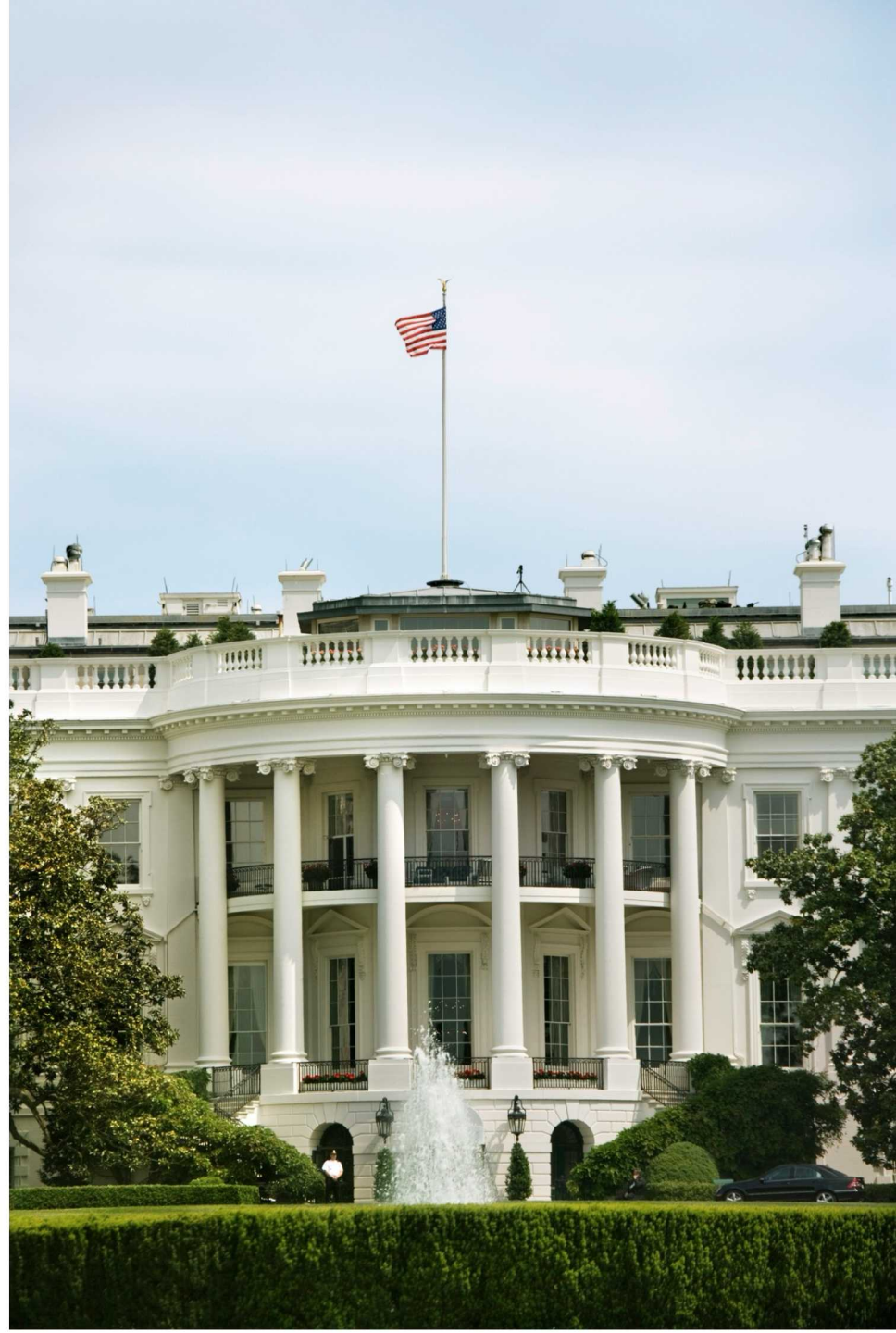
Intensifying Tech Race

- AI adoption accelerating.
- Realising the potential of digital currencies.
- Cybercrime proliferating.



Impact of US Elections

- 5th November looms large.
- Uncertain outlook for commodities.
- Inflation threat receding?

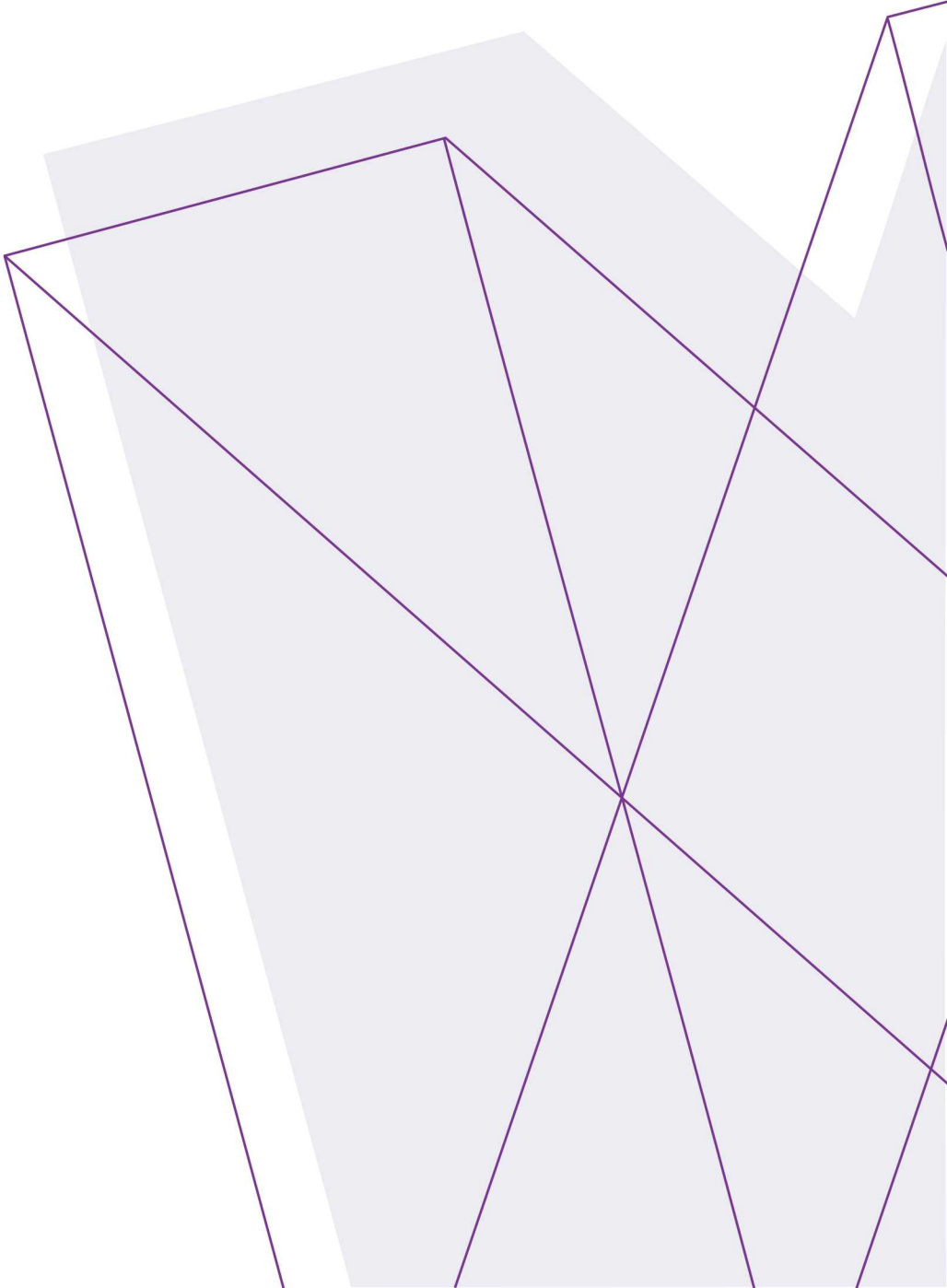


Increasing Complexity

- Markets easily sent into turmoil.
- More than ever, clients are focused on managing their risk.
- Expert insights have never been more valuable.



Thank you



A hand holding a crystal ball against a sunset background. The crystal ball is held in the center, and the sunset is visible through it, creating a reflection of the sun and sky. The background is a blurred sunset over a body of water.

Fireside chat
Profiting from a World in Transition

Fiona Tramontana, General Manager, ASX
Arthur Fan, APAC CEO, Marex