

Press releases

Artificial Intelligence (AI): From trend to global growth driver in three years

13/05/2020 

Summary

According to a Grassroots® survey from Allianz Global Investors, one of the world's leading active investment managers, roughly 75% of the 550 IT decision-makers surveyed globally, are expecting their budgets to increase in 2020 compared to the previous year.

Key takeaways

- According to a Grassroots® survey by Allianz Global Investors, companies continue to increase their IT budgets
- 70% of those surveyed have one or more AI projects currently ongoing or already incorporated
- Actively managed thematic funds such as the Allianz Global Artificial Intelligence fund make structural changes investible at an early stage

13.05.2020. According to a Grassroots® survey from Allianz Global Investors, one of the world's leading active investment managers, roughly 75% of the 550 IT decision-makers surveyed globally, are expecting their budgets to increase in 2020 compared to the previous year. 40% said that the COVID-19 crisis has increased their company's willingness to spend more money on IT projects and IT infrastructure, with corporate security and cloud computing remain at the top of the spending agenda.

The importance of artificial intelligence (AI) has also increased during the international fight against the pandemic and in investors' portfolios, with 97% of respondents planning to start at least some AI projects this year and 70% having one or more AI projects already incorporated.

Sebastian Thomas, portfolio manager on the Allianz Global Artificial Intelligence team, invests across all sectors and areas that benefit from AI technology. This includes technology companies that build the infrastructure for AI and companies that incorporate AI into their existing business models.



Commenting, he said:

"Those who assign AI investments exclusively to the technology world underestimate the potential reach of AI. We are still at an early stage, but the importance of AI is already becoming apparent for the containment of future pandemics, and for the further development of modern medicine. The fight against the spread of Covid-19 is proving to be a testing ground for how AI can be used. For example, experiences and findings of how to slow down the spread of pathogens and accelerate medical treatments are being transferred to other sectors".

Thomas and his team have been exploring topics related to the coronavirus pandemic including themes such as "Stay-at-Home working" and "Home-Office", including companies which cover the needs of people now living under "social-distancing" conditions.



Sven Schäfer, Head of Retail & Wholesale Germany, Austria and Central/Eastern Europe says:

"The results of the GrassRoots Research confirm AllianzGI's approach to this investment theme. Trends such as AI are developing rapidly into significant growth drivers of the global economy. As a result, investors are focused on important components of structural change and have supplemented their portfolios with structural growth potential. We believe this is a resilient strategy, despite the sharp slowdown of economic activity."

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*AUM data as at 31 December 2019.

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AllianzGI creates integrated, global set-up for fixed income

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Summary

Having broadened and deepened its fixed income capabilities significantly over many years, AllianzGI is now taking the natural next step in the evolution of its fixed income offering by bringing its capabilities into an integrated, global structure.

Key takeaways

- Latest evolution unlocks the full potential of AllianzGI's deep pool of fixed income talent
- Five pillars of investment expertise established
- Franck Dixmier to lead platform as CIO; Malie Conway named Head of US Distribution

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