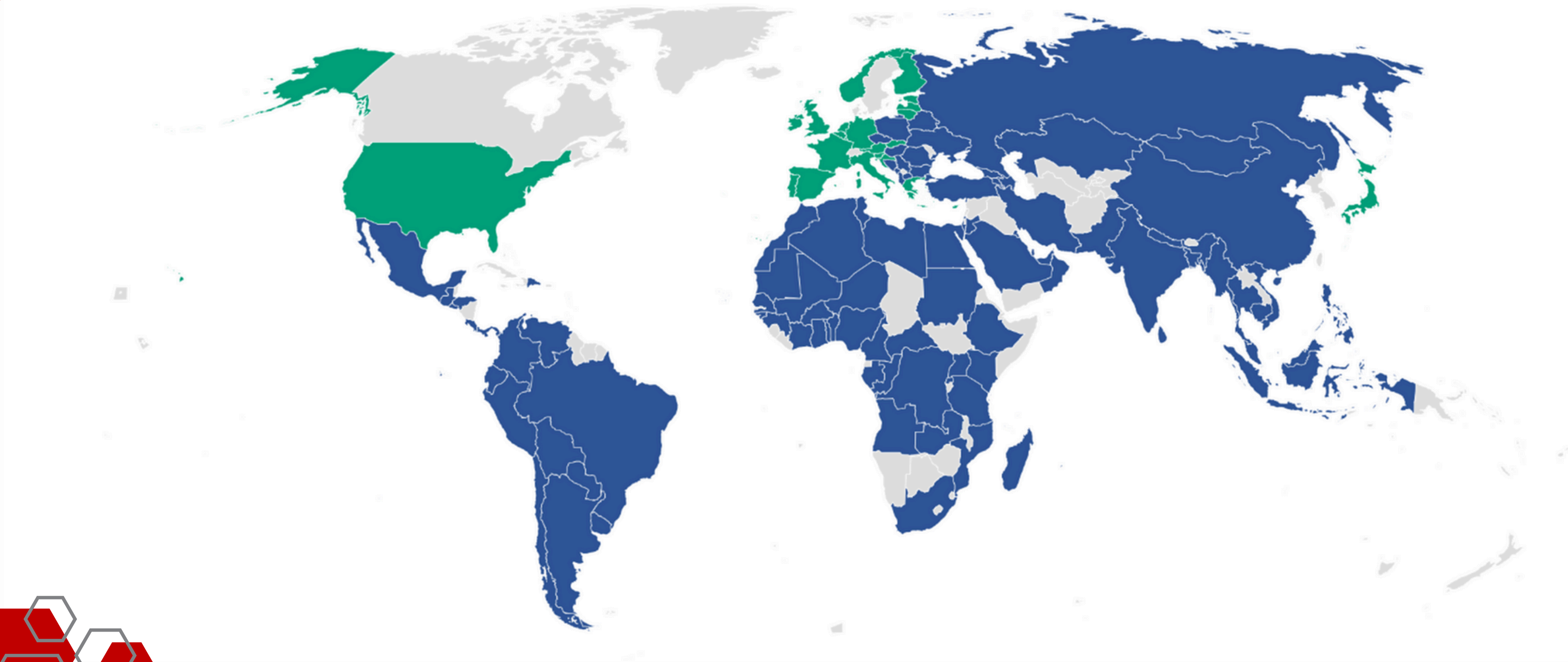




# **WHAT YOU MAY HAVE MISSED THIS MONTH**

**JUNE 2025**

## JUNE 2025 – Mapping of countries and geographical areas



## Topics covered in June 2025



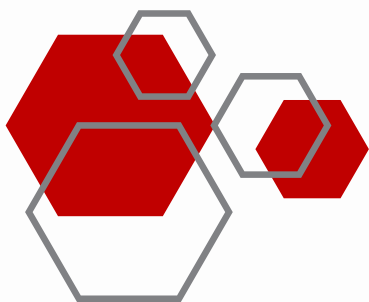
**Israël-Iran** war: initial assessment of the issues at stake, possible scenarios and their implications for the markets, particularly the energy markets.



**Mexico:** Compounding challenges with a cyclical lull and growing financial pressures.



Emerging Markets Exchange Rate outlook: following a broad USD trend though with persistent idiosyncratic situations





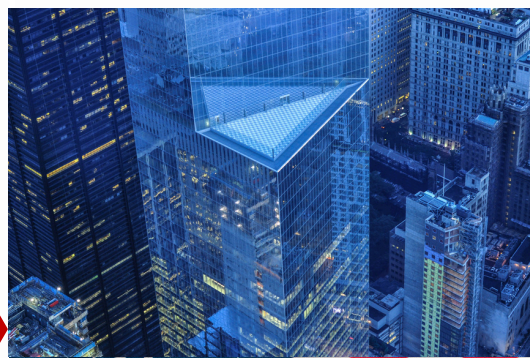
# Topics covered in June 2025



Geopolitics and Trade: Decoding the new U.S. economic strategy: What does this mean for exporters?



As the geopolitical and economic landscape shifts, how companies must find the right balance between reaction, anticipation, and long-term strategy?

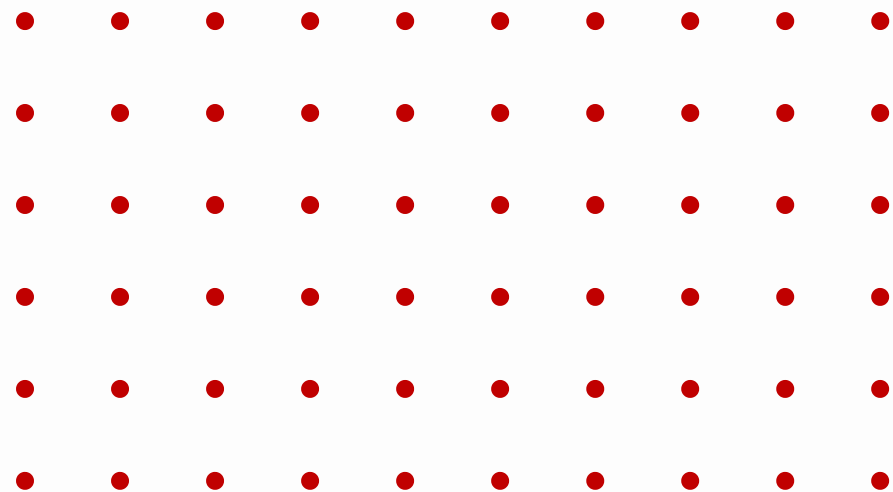


Weekly macro-market monitoring trends and analysis of the latest economic data for developed economies including the US, Eurozone, Japan and the UK.



# Any questions?

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