



CIBC CAPITAL MARKETS

CIBC PERSPECTIVES

Economic and Rates
Strategy – Mid-year
Update



June 1, 2026

Economics and Rates Strategy – Mid-year Update – [watch now](#)

CIBC's Brad Black leads a semi-annual discussion with Avery Shenfeld and Ian Pollick on key trends and challenges in the macro environment as we head into the second half of 2026. The panel highlights ongoing geopolitical issues, relative economic performance in Canada and the US, and shares insights on opportunities and risks for the balance of the year, including central bank policy, the question of the AI Capex spending boom, and evolving market dynamics.



Running time: 18 minutes, 27 seconds

Host

Brad Black, Managing Director and Head, Global Distribution

With

- Avery Shenfeld, Managing Director and Chief Economist
- Ian Pollick, Managing Director and Head, Fixed Income, Currency and Commodities Strategy

Also available on:



If you missed any of the CIBC Perspectives videos, you can catch up [here](#).

Le contenu est en anglais seulement.

The CIBC logo and "CIBC Capital Markets" are registered trademarks of CIBC, used under license.