

# Webinar recap: Global Infrastructure Trends – Insights for Asia Pacific Investors

## Speakers



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# Global Infrastructure Trends – Insights for Asia Pacific Investors

## 5 charts that explain how infrastructure performance is shifting

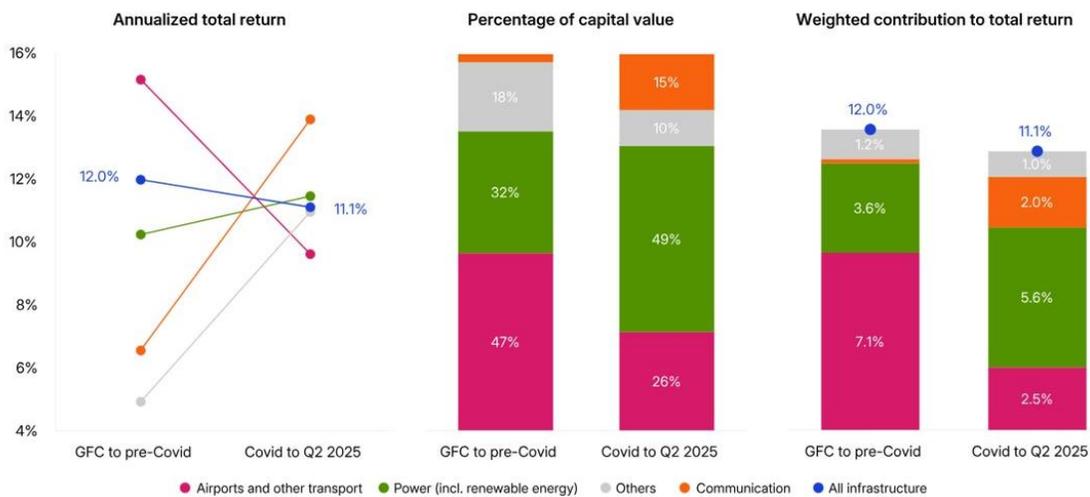
Investors in private infrastructure increasingly need to understand why performance differs across sectors and regions, and how those differences should inform portfolio construction and strategy. Aggregate or fund-level data can show broad outcomes, but an asset-level view provides an extra layer of depth to help surface the drivers of return and risk that influence performance.

Drawing on insights from the expanded [MSCI Global Quarterly Private Infrastructure Asset Index](#), which tripled its equity-value coverage in 2025, Will Robson, global head of real asset solutions, and Ben Wyburd, head of APAC private assets, explored how the landscape is evolving.

Below are five key charts and insights from their discussion.

### 1. Energy transition and digital demand are reshaping infrastructure

The long-standing dominance of airports and transport has given way as COVID-19 highlights the fragility of demand-linked assets and redirected capital. Renewable energy, power transmission and communications infrastructure have emerged as the [new pillars of performance](#), buoyed by policy support, decarbonization imperatives and accelerating digital demand.



### 2. APAC stands out for its resilience

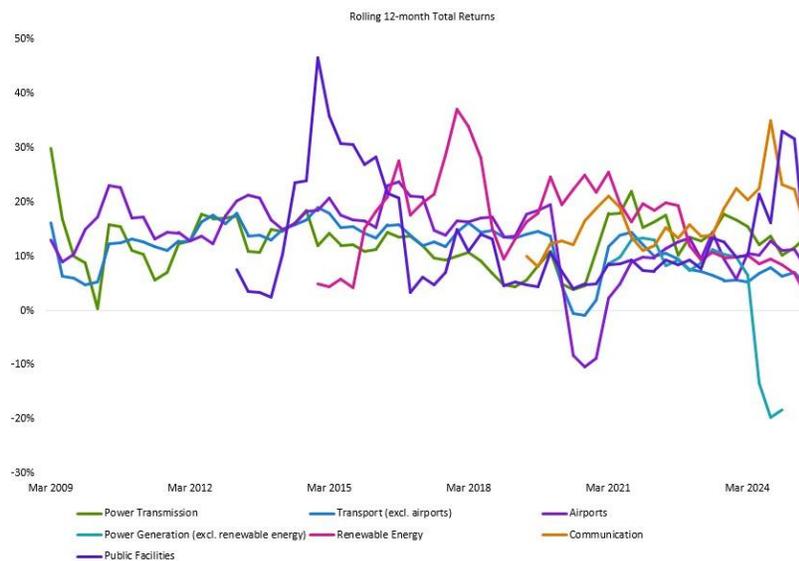
APAC assets exhibited steadier long-term performance and offered more stable returns overall. While COVID-19 affected all regions, driven by reduction and income, the recovery since

then has looked quite different. The Americas rebounded more strongly, supported by greater exposure to power and renewable-energy assets.



### 3. Yet within the region, performance diverges

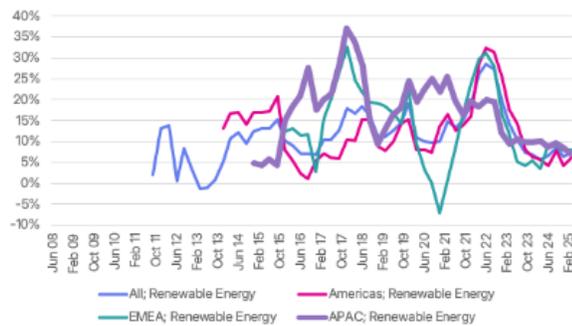
Long-term patterns show that regulatory-backed and essential services, such as transmission and renewables, have tended to deliver more stable returns, while volume-sensitive assets like airports and transport remain more cyclical. These differences highlight the importance of sector selection and diversification across infrastructure segments to help manage both cyclicality and idiosyncratic shocks.



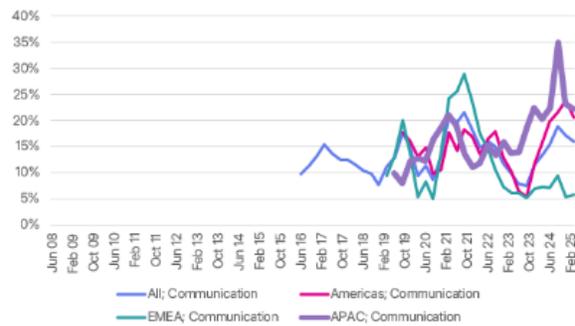
## 4. Cross-segment patterns reveal distinct regional strengths

Renewable-energy assets in APAC proved more resilient through COVID-19 than those in EMEA, which briefly dipped into negative territory, while the strongest post-COVID rebounds occurred outside APAC. In communications, APAC has been a consistent outperformer over the past decade, outpacing both the Americas and EMEA. These cross-segment differences highlight how sector context within each region can point to where opportunities and pressures are emerging.

→ Renewable Energy 12m Returns by Region

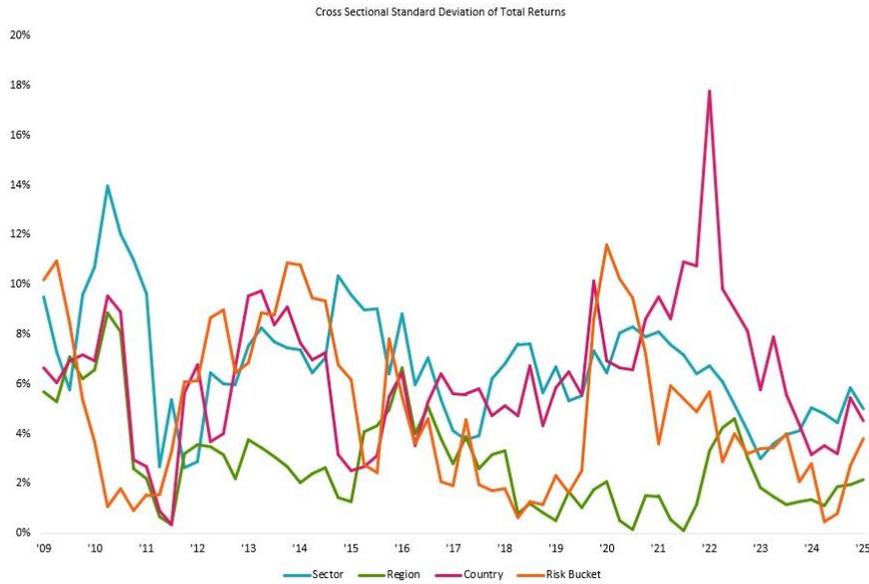


→ Communication 12m Returns by Region



## 5. Return spreads suggest where performance may diverge

Infrastructure returns differ sharply across sectors, regions, countries and risk buckets, offering potential opportunities for both strategic and tactical allocation. These variations suggest that portfolios with different exposures can experience materially different outcomes, underscoring the importance of detailed attribution analysis to understand what may be driving relative performance.



[Speak to a specialist](#) or visit our [Private Infrastructure Intelligence](#) page to learn more about how MSCI's infrastructure models and data can help clarify the drivers of performance.

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