Making it Big in China

By Chris Hoare | February 16, 2019

This week we wrote again (HERE) on the outlook for 5G capex in China. Capex is always a (the?) key driver for the Chinese telcos, but with the National People's Congress approaching (5th March), and the telcos likely to announce 2019 capex budgets at their full year results towards the end of March, and probably give some indication of spend in 2020, the likely shape of 5G spend is set to be the definitive catalyst for the stocks over the next few months.

(more...)

Full 12-month historical recommendation changes are available on request

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