
Cow release in the UK opens for travel and leisure stocks

There is a cow release now in the United Kingdom with restaurants opening. The travel sectors can speed up with a high proportion of vaccinated UK citizens. It can make shares in hotels, air lines, restaurant chains, and retail sales interesting. Real estate stocks with focus on offices and retail have also lagged.

The pattern we see now in the United Kingdom is likely to be repeated a few months later in the rest of Europe. Swedish equities in the crisis sectors generally have a longer way to go to earlier price peaks than their British colleagues. The recovery game may therefore be more interesting to play on the Stockholm rather than the London Stock Exchange.

We study the price development for the London Stock Exchange (FTSE index) and its hotel and leisure sector. But we also look at Swedish travel stocks in hotels and flights. Another sector where the equity prices tend to have a long way back to their old peaks is real estate companies with focus on office tenants. This can also be a way of playing the recovery game.

Find out more in our weekly letter on certificates.vontobel.com: [Read the weekly newsletter here.](#)

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