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Equity investors make their predictions for 2026

by Sara Havlena

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Equity investing has been tough in 2025 with many investors sticking to the sidelines waiting for rates and pricing to normalize. With the Fed lowering rates and debt capital expected to pick up next year, will equity investing pick up as well? We asked the equity providers themselves what they predict for investing in 2026, as well as their strategies going forward. Here is what they had to say.

Jennifer Clausen, Partner, LEM Capital

The 2025 investment volume has increased significantly over the past two years, and we are actively deploying capital into a repriced market environment. We anticipate volume in 2026 will continue to grow, exceeding 2025 and returning closer to normal pre-2020 volumes.

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Ray Cleeman, Head of Capital Markets & Lending, Pensam

Will be stronger then 2025, we are seeing much more in the acquisition space and have good deal flow now.

Matthew Cohen, VP – Credit Partners – Atlantic Pacific Companies

The market will stay slow through the first half of the year but rapidly accelerate in the second half of 2026.

Leaderboard-CR House Ad Fin Conference (10/30/25-5/7/25
Jeffrey Juster, President/CEO, Newport Capital Advisors, LLC

We expect the market to experience many difficulties due to higher interest rates and increased insurance costs. We have maintained a high level of liquidity and we are prepared to offer creative solutions.

Alec Miller, VP, Red Starr Investments

While the job market may create some near-term friction, we still expect a healthy mix of opportunities, both on new acquisitions and in providing rescue capital for deals that need to right-size their capital stacks in markets still working through oversupply.

Robin Potts, Partner/Chief Investment Officer, Canyon Partners Real Estate

More robust opportunities with increased transaction volume across performing and non-performing.

Jeff Reder, Managing Director, CenterSquare Investment

Activity is expected to pick up in 2026, driven by improving macroeconomic visibility and a closing of the valuation gap between buyers and sellers.

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