

Advisory Blog

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By: Aaron Dunn, CFA | & Bradley Galko, CFA | October 19, 2022

Boston - Investing in portfolios that track benchmark indexes can be a great investment approach when the market is going up. However, in certain market periods when interest rates are rising, inflation is surging and geopolitical tensions are high —2022 is a good example — having an active manager who can identify leading companies priced at a discount to their intrinsic value may become essential.

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