

# Advisory Blog

Timely insights on the issues that matter most to advisors and their clients

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By: [Jim Caron](#) | September 21, 2022

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### [Combine a Roth Conversion with a Charitable Giving Strategy](#)

By: [Eileen Tam](#) | September 20, 2022

**Boston** - One of the most important considerations when selecting between a traditional individual retirement account (IRA) and a Roth IRA is whether an investor's tax rate will be higher or lower in retirement. Clients who believe their income will be higher in the future may want to convert into a Roth IRA — but the conversion should be planned within a holistic investment strategy.

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### [When MBS Benchmarks Go Low, Active MBS Managers Go High](#)

By: [Andrew Szczurowski, CFA](#), [Chip Driscoll, CFA](#) | September 19, 2022

**Boston** - When we borrow Michelle Obama's famous catchphrase, we aren't talking about politics in the run-up to the midterm elections. What we mean is that active investors may be able to capture attractive opportunities by migrating up in coupon in the agency mortgage-backed securities (MBS) market.

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### [Inflation May Be Peaking in the U.S. What about the Rest of the World?](#)

By: *Jim Caron* | *September 14, 2022*

**New York** - Inflation is inching downward at the headline level, but remains stubbornly high at the core level (excluding food and energy). In fact, inflation data released on September 13 revealed that prices rose slightly in August. Still, inflation in the U.S. may be peaking, but it's more of a "rounding top" than a sharp decline from the highs, putting added pressure on the Fed to continue tightening.

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### [Economic Freedom Broadly Curtailed During Pandemic, Says New Report](#)

By: *Emerging Markets Debt* | *September 14, 2022*

**Boston** - Every year since 1996, Canada's Fraser Institute has published its Economic Freedom of the World, as a reminder of the important link between a country's economic freedom and its growth potential. The 2022 report, based on data through December 2020, was released on September 8 and is the first to include the impact of the COVID-19 pandemic.

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By: *Kyle Lee, CFA* | *August 4, 2022*

**Boston** - China's zero-COVID policy of rolling lockdowns of major cities, accompanied by border closings, has generated a steady stream of headlines for the past couple of years as has the government's crackdown on tech companies, including industry giants Alibaba and Tencent.

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Portfolio Manager  
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[Inflation Continues to Boil, with No Simmer in Sight](#)

By: Andrew Szczurowski, CFA | July 14, 2022

**Boston** - The sun is the center of our solar system and the nonfarm payroll report used to be what the bond market and the Federal Reserve revolved around. While we don't have our own James Webb Space Telescope, there is no doubt the monthly Consumer Price Inflation (CPI) report is at the center of the bond and Fed universe now.

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Andrew Szczurowski,  
CFA  
Head of Agency MBS  
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By: EV Forward | July 11, 2022

**Boston** - Just as the loan market has proved its resiliency over several decades and business cycles, today we see value in this asset class, and we believe the forward return potential from these levels is bright.

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