



# Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to investors.

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[MUNICIPAL BONDS](#)

### [Higher Education Sector Under Pressure: Assessing the Challenges](#)

By: [Colin Shaw](#) | August 6, 2024

Higher education in the U.S. currently faces unprecedented challenges from rising labor costs, spiraling tuition, a shrinking student pool and questions about its very role and future. Further, we have seen a sharp uptick in college and university closures. When investing in this sector, we have found applying fundamental, bottom-up analysis is critical as no two schools (even those identically rated) are the same.

"As analysts, our job is to distinguish between weak and strong institutions, seeking to ensure our portfolios are invested in schools with solid balance sheets, brand recognition, pricing power and consistently strong operating performance."

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EMERGING MARKETS DEBT | [INTERNATIONAL/GLOBAL](#)

[No capex, no cry](#)

By: *Emerging Markets Debt* | May 8, 2024

## KEY POINTS

1. India's standout growth story is garnering increased attention among emerging markets investors.
2. Optimistic households are borrowing more, causing some concern over the build-up of "China-like" debt risks.
3. While higher private capex would help boost economic activity, the current growth trend appears stable and offers potential upside for fixed income investors.

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Emerging Markets Debt



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