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

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[Heirs of high earners must wrangle new tax laws, as massive generational wealth transfer looms](#)

By: [Eaton Vance on Washington](#) | August 26, 2024

Bracing for the largest generational wealth transfer, the Internal Revenue Service (IRS) has raised the age at which workers must begin withdrawing funds from their qualified retirement accounts. The final rules (TD 10001; RIN:1545-BP82), released last month, amend the SECURE Act 2.0 permitting account holders to maintain 401(k), 403(b) and individual retirement account savings beyond the previous age limit of 70½ while eschewing hefty excise taxes punishing late withdrawal of those assets. The IRS also finalized new rules for non-spouse beneficiaries who inherit from original depositors who died in 2020 or later.

"Changes in required minimum distribution age enable workers to leave more cash in retirement accounts longer to help grow savings, part of sweeping legislative and regulatory efforts to whittle the potential retirement savings gap."

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[Year of \(non\) elections](#)

By: *Emerging Markets Debt* | August 21, 2024

Boston - Coming into the year, all eyes were on countries with elections including India and Taiwan in Asia. But the surprise has been political change in countries without elections. Sheikh Hasina was forced out as PM of Bangladesh by protesters and fled to India. Vietnam's former Minister of Public Security was able to attain both the Secretary General position and Presidency after a series of maneuverings. Thailand's Prime Minister was removed by a Constitutional Court ruling. What do these episodes say about the pitfalls of weakening economic institutions in emerging markets?

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[Mitigating Benchmark Concentration with Portfolio Activation](#)

By: *Global Opportunity* | July 23, 2024

In 2022, we highlighted in our publication, "Opportunity Optimum,"¹ how investors' flight to perceived safety amid post-pandemic market volatility had increased benchmark concentration. Two years later, that risk appears even more pronounced as the top 15 companies have increased from 20% to 26.5% of the MSCI ACWI Index since 2022.² This increased benchmark concentration has been driven primarily by investor enthusiasm for megatrends of generative artificial intelligence (AI) and weight loss drugs (GLP-1).

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[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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