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By: [Andrew N. Sveen, CFA](#), [Christopher Remington](#) | June 17,

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"We see value in this asset class, and we believe the forward return potential from these levels is bright."

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Boston - From January to March, the high yield municipal market posted the second-worst first quarter returns in 40 years, surpassed only by the first quarter of 2020 when the COVID pandemic hit. Now with stable municipal credit quality and higher absolute yields than at the beginning of the year, we are starting to see some value and better opportunities in the high yield municipal space.

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By: [John Streur](#) | June 27, 2022

Washington - Corporations

throughout the world are working to transition their businesses away from the use of fossil fuels because of the increasing business risks to companies from the harm this causes people, the local environment, and global climate change. This is a massive, multidecade effort that will impact the vast majority of companies and that has material implications for every living creature on the planet-and, of course, for long-term investors. The speed and the success or failure of this transition will inform quality of life for the world's population for generations to come.

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By: [Kyle Lee, CFA](#) | August 4, 2022

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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
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[Agency MBS Risk/Reward Compelling after Worst Quarter in 35 Years](#)

By: Andrew Szczurowski, CFA | & Chip Driscoll, CFA | April 20, 2022

Boston - The agency mortgage-backed securities (MBS) market experienced its worst quarter in over 35 years, with the ICE BofA U.S. MBS Index falling 5% in the first quarter. We would have to go back to 1987 and 1994 to find quarters when the index was down more than 2% — not even during the taper tantrum in 2013.

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