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By: [Forward Thinking](#) | September 12, 2023

In this issue of Forward Thinking, we guide investors seeking to maximize the return potential amid shifting inflationary trends throughout the world, sharing our insights about how to increase their allocations to both global equities and fixed income.

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- [1. As global central banks near the end of a historical cycle of tightening monetary policy, we believe a moderate recession is a more probable outcome in 2024.](#)
- [2. Increasing dispersion in valuations across rating segments, sectors and individual issuers will continue to provide opportunity and the ability to capture attractive entry points.](#)
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By: [Emerging Markets Debt](#) | January 31, 2024

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- [2. As ever, country selection remains key in emerging markets to capture the most attractive idiosyncratic risk and opportunity in this broad and diverse investment universe.](#)
- [3. We foresee stronger appetite for EM debt in 2024, with net flows returning to positive territory as investors come back to the asset class.](#)

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By: *Stephen C. Concannon, CFA* | & *Will Reardon* | *December 6, 2023*

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