

Advisory Blog

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

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[Artificial Intelligence from a Value Perspective: Enabling the Evolution of Compute Power](#)

By: Aaron Dunn, CFA | & Bradley Galko, CFA | April 24, 2024

KEY POINTS

1. AI opportunity expands beyond the growth darlings that were the immediate and primary beneficiaries over the past year.
2. Utilities experienced the largest historical relative underperformance to the broader market in 2023; in our view, the reward relative to risk is now quite compelling for a sector that is experiencing an inflection in fundamentals.
3. We believe renewables, such as solar and wind, combined with battery storage, will play an increasing role in behind-the-meter power solutions.

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Equities

Election Cycle is Very Likely to Impact Stocks

By: Aaron Dunn, CFA | & Bradley Galko, CFA | February 14, 2024

KEY POINTS

- 1. During presidential election years over most of the last century, on average both U.S. large- and small-cap value have outperformed their growth peers.
- 2. Value vs. Growth's dominance in election years also correlates with U.S. gross domestic product (GDP) growth and detraction.
- 3. Incumbent candidates and parties keen to win reelection seek to make voters feel financially secure when heading to the polls.

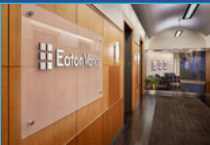
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