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By: [Bradley Galko, CFA](#), [Aaron Dunn, CFA](#) | January 6, 2023

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By: [EV Forward](#) | December 15, 2022

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KEY POINTS

- 1 It's time for emerging markets to shine in the next decade.
- 2 Growth expectations have been reset and appear to be priced in.
- 3 Opportunities await, even with risks ahead.

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By: Aaron Dunn, CFA | & Bradley Gallo, CFA | April 28, 2023

#### KEY POINTS

1. We believe consumer spending will remain solid over the next quarter.
2. The current savings rate is at the lowest recorded level since 2005.<sup>1</sup>
3. Continued declines in wage and employment growth through 2023 will hurt the consumer.
4. We favor brands and companies that are already anticipating a tougher consumer environment.

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By: [Aaron Dunn, CFA](#) | & [Bradley Galko, CFA](#) | February 13, 2023

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