

Insights

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

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INTERNATIONAL/GLOBAL

Forward Thinking: How Global Inflationary Trends Fuel Opportunity for Investors

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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HIGH YIELD | NAVIGATING THE CURVE | OUTLOOK

2024 Outlook: High Yield Bonds

By: Stephen C. Concannon, CFA, Will

Reardon | December 6, 2023

Higher Volatility in 2024 May Present Attractive Entry Points for High Yield Bonds

KEY POINTS

- 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.
- 3. We have maintained our cautious positioning and continue to prefer defensive sectors that trade wide of historical norms, such as health care, given the sector's historically defensive characteristics.

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RESPONSIBLE INVESTING

Where's the Trickle

Down? Gender

Diversity in

Corporate Pipeline

Lags the Boardroom

By: <u>Yijia Chen, CFA</u> | March 15, 2024

As March is Women's History

Month, it's timely that we review
women's headway moving up the
corporate ranks and the progress
of gender diversity initiatives
worldwide.

EM EQUITIES

EMERGING MARKETS | <u>EQUITIES</u> | <u>HIGH CONVICTION ACTIVE</u>

Brazilian Economy
Boosted by
Reasonable
Government
Legislations and
Tight Monetary
Policy

By: Paul Psaila | February 5, 2024

KEY POINTS

- 1. A year into President Lula's term, the political and economic situation in Brazil is better than many had expected.
- 2. The economy will likely grow more than expected as interest rates continue to fall.
- 3. We believe Brazil remains
 cheap compared to other emerging
 markets with lower inflation and
 rates acting as a tailwind for
 growth.

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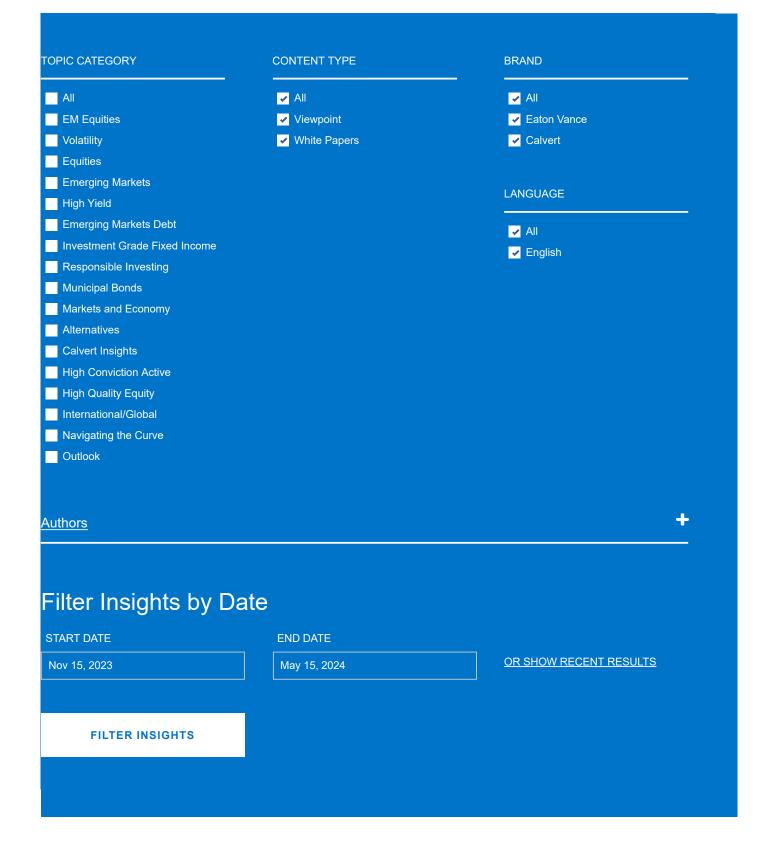
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INVESTMENT GRADE FIXED INCOME | NAVIGATING THE CURVE | OUTLOOK

2024 Outlook: Investment Grade Credit

By: Richard Ford | December 6, 2023

Investment Grade Credit Can Offer Attractive Income and Capital Preservation in Uncertain Times

- 1. We expect risk of recession and capital preservation to dominate the investment debate in 2024. Investment grade credit offers potential risk mitigation for when central banks move rates lower.
- 2. We believe corporates enter 2024 with conservative business models, having cut costs and raised liquidity in recent times. This makes high quality Fixed Income an attractive asset in uncertain times.
- 3. A global regime change characterized by de-globalization, higher structural inflation, quantitative tightening, increased geo-political risk and higher government debt, suggests 2024 is the start of a new era for investing.

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Richard Ford Global Head of Investment Grade Credit Portfolio Manager

Insights









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