

Insights

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

Featured



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 | EQUITIES |
HIGH CONVICTION ACTIVE

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.

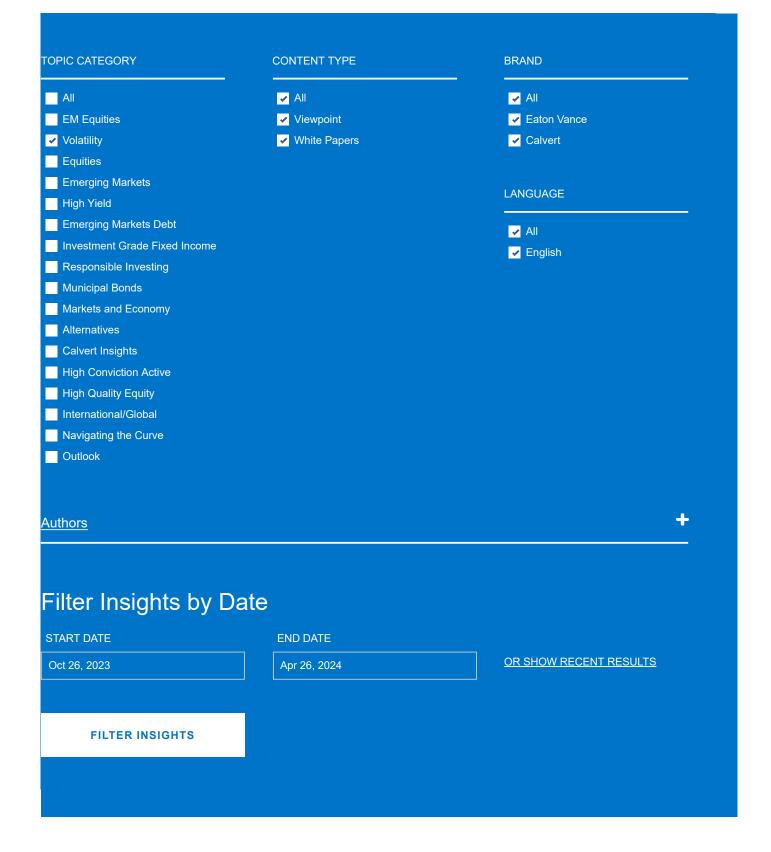
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VOLATILITY

200 Years of Data Affirm Our Long-Term Confidence in the 60/40 Portfolio

By: Jitania Kandhari | April 15, 2024

- 1. The 60/40 portfolio experienced a rollercoaster ride, down 17.5% in 2022 and up 17.2% in 2023. ¹
- 2. Whenever U.S. inflation exceeded 2.4%, there was an increase in the median correlation between stock and bond returns.
- 3. Two hundred years of historical analysis suggests there is an 80% probability of positive returns in the two years following a year of negative returns for both stocks and bonds.

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Jitania Kandhari Head of Macro and Thematic Research **Emerging Markets Equity**





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