

Insights

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

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[**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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[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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[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.](#)

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[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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[200 Years of Data Affirm Our Long-Term Confidence in the 60/40 Portfolio](#)

By: *Jitania Kandhari* | April 15, 2024

KEY POINTS

- 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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[2024 Outlook: Emerging Markets Equities](#)

By: Jitania Kandhari | December 15, 2023

Increased Heterogeneity in Economies and Markets

KEY POINTS

- 1. Increasing dispersion of returns in emerging markets (EM) countries enhances the appeal of active management.
- 2. We are taking active positions in countries and stocks based on our high-conviction views.
- 3. Growth, inflation and interest rates will remain important variables across different countries in 2024, as will elections as several countries go to the polls.

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