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All-In Moment for Putin in Ukraine War

Boston - Despite reports of notable damages and casualties inflicted by Ukrainian armed forces on Russian troops, Russia continues to make modest gains in the amount of land controlled. Until Russia stops making gains, we think it is unlikely that there will be a negotiated peace agreement.

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Russia-Ukraine Conflict Hard to Analyze and Harder to Predict

Boston - Global trading this week suggests that investors should avoid owning any Russian assets. Developments over the weekend may also indicate brighter prospects for Ukrainian assets, as evidenced by Ukraine's success in slowing Russia's advances and securing military and financial support from foreign governments and international institutions.

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John Baur

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Landscape

Boston - In 2022, we expect emerging markets (EM) may embark upon a road to recovery, albeit with potential bumps along the way. While slower but ongoing recoveries in economic growth and global trade combined with reasonably attractive valuations for EM debt should act as tailwinds.

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