

Advisory Blog

Timely insights on the issues that matter most to investors and their clients

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By: [Rey Santodomingo, CFA](#) | February 28, 2021

Seattle - Continuing a trend of the past five years, exchange-traded funds (ETFs) grew in assets under management (AUM) in 2020. More investors are using ETFs as they shift from active to passive investing. One favored advantage of ETFs is tax efficiency due to the low turnover associated with index-based investments, in addition to many ETF providers' use of the creation and redemption process to reduce capital gains distributions.

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By: [Joe Hudepohl, CFA](#), [Charles B. Reed, CFA](#) | February 25, 2021

Atlanta - Throughout 2020 and so far this year, low-quality stocks have significantly outperformed their high-quality counterparts. Within several equity benchmarks, the differential has been significant. In the Russell 1000® Growth Index, for example, low-quality stocks outpaced high quality by 29% in 2020 — the largest performance gap in the history of the index, dating back to 1984. Similar to 1999 and early 2000, primarily large-cap, technology-oriented names have dominated equity index returns and we've seen a lot of "animal spirits" at work.

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[How to use customized portfolios to help boost yield](#)

By: [Jeff Brown, CFA](#), [James Roccas](#) | February 24, 2021

Seattle & New York - When we think of the apex of customization, our minds are drawn to 7-Eleven, which became the first major retailer to offer self-serve fountain drinks in 1983. Up until that point, a customer ordered a soda, and someone behind the counter would fill it. But that glorious day marked the birth of the so-called Graveyard — a mixture created just for and by the customer, with whatever mix of carbonated beverage they liked.

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