

Advisory Blog

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

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September 27, 2021

London - We see some challenging crosscurrents driving the international equity markets, although we are optimistic about their long-term prospects overall. Here, we offer some perspectives on what we see as areas of lingering concern, and how we believe investors can best navigate this complex, shifting backdrop.

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September 24, 2021

Boston - According to a new analysis by a consortium of researchers advising the CDC, the Delta surge will likely decline steadily now through next spring —without a significant bump up in the winter. As a result, we expect this will be our last weekly update on health policy responses and other COVID developments.

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By: [Eric Stein, CFA](#) | September 23, 2021

Boston - The U.S. Federal Reserve had what I would describe as a moderately hawkish meeting on Wednesday, as it accelerated its timetable for tapering, and set the stage for eventual rate increases.

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By: [Vishal Khanduja, CFA](#) | & [Henry Mason](#) | September 2, 2021

Boston - In our experience, considering environmental, social and governance (ESG) factors, along with traditional fundamental research, is critical in evaluating the quality of an issuer and the risk-versus-opportunity profile of a bond.

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By: Vishal Khanduja, CFA | & Brian S. Ellis, CFA | July 27, 2021

Boston - U.S. and global economies may continue to strengthen as more people are vaccinated against COVID-19, albeit at uneven rates geographically. We believe the ongoing global recovery and accommodative policies of major central banks should support risk markets in the near term. Looking out a few quarters, however, we think markets could become increasingly volatile depending on the course of monetary policy.

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By: Bernard Scozzafava, CFA | & Evan Rourke, CFA | July 1, 2021

Boston & New York - Investors have been building bond portfolios using a laddered strategy since the early 1900s at least. Even in a flat or rising rate environment, a bond ladder's total return may exceed its starting yield through the phenomenon of roll-down. The benefits of roll-down relate directly to the shape of the yield curve. Given the current steepness of the curve, this pickup could be as much as an additional 1% per year.



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