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

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### [Following a choppy Q1, high yield bonds appear poised to strengthen](#)

By: [Stephen C. Concannon, CFA](#), [James Croom, CFA](#) | June 10, 2021

Although the U.S. high-yield market faced some challenging crosscurrents in Q1, it appears to have entered a recovery phase -- supported by economic growth, falling default rates, and U.S. monetary and fiscal policies.

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### [Real interest rates suggest value in EM Debt](#)

By: [Emerging Markets Team](#) | June 16, 2021

**Boston** - One of the key macro indicators of value in emerging markets (EM) debt is the real interest-rate differential with developed-market debt — the spread between EM debt and developed markets, after adjusting for anticipated inflation in respective countries. By that measure, in the wake of first-quarter volatility, we see EM debt as offering a number of value opportunities.

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By: [Jade Huang](#) | June 10, 2021

**Washington** - World Oceans Day, celebrated annually on June 8, was created as a way of encouraging everyone to celebrate the role that oceans play in our lives. It also highlights the importance of water in general, essential to survival but a scarce resource for so many.

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By: [Eric Stein, CFA](#) | June 17, 2021

**Boston** - The June 16 meeting of the Federal Open Market Committee delivered a bit of a hawkish surprise, as the consensus projection for new rate hikes moved up to 2023, compared with March when no FOMC members predicted hikes that early.

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