

Insights

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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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By: [James Croom, CFA](#), [Stephen C. Concannon, CFA](#) | June 8, 2021

Boston - Earlier in the year, we saw fairly consistent leadership in the high-yield market by some of the more cyclical sectors, led by entertainment & film, air transportation, publishing & printing and energy. One area in particular that has captured our attention is [acute care hospitals](#).

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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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[Brexit reminds international equity investors to look beyond the benchmark](#)

By: Greg Liebl, CFA | December 28, 2020

Minneapolis - When the clock strikes midnight in Brussels on New Year's Eve, the United Kingdom's post-Brexit transition period will officially come to an end — neve mind that it'll only be 11 pm in London. For all intents and purposes, any trade deal between the two sides will have needed to be worked out well before December 31. The way negotiations have been going, it's unlikely that any amount of additional time would make much of a difference in the matter.



Greg Liebl, CFA
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