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

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By: [Jeffrey D. Mueller](#) | & [Stephen C. Concannon, CFA](#) | February 17, 2021

London & Boston - The world is awash in stimulus. U.S. GDP estimates for 2021/22 are consistently being revised upwards with every check that Congress writes. Expectations for Treasury yields and inflation are rising. Cyclical are leading the rebound, and the expectation is that this trend will continue. Where do you invest in credit in this environment?



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