



# Insights

In-depth perspectives from portfolio managers and industry experts on the issues that matter most to 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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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: [Jade Huang](#) | June 10, 2021

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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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[Using engagement to drive progress on climate change](#)

By: Kimberly Stokes | April 22, 2021

**Washington** - Making progress against climate change is a year-round effort, and corporations and investors each have an essential role to play. Companies can make a difference by establishing best practices to reduce their environmental impact. Asset managers can help by utilizing a rigorous corporate engagement approach to encourage improvement in corporate behaviors in a way that contributes to a more sustainable and equitable world, and potentially contributes to an investment's business prospects.



Kimberly Stokes  
Corporate Engagement  
Strategist  
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