

Insights

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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: [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: [Vishal Khanduja](#) | & [Brian Ellis](#) | March 26, 2021

For fixed-income investors, understanding environmental, social and governance (ESG) factors – as they are financially material to performance – has proven to be vital for assessing an issuer’s fundamental quality. The pandemic has driven home this point by heightening awareness of the key roles companies play in creating a sustainable global economy –2020 was a pivotal year for investor acceptance of responsible investing, including record green bond issuance.

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Vishal Khanduja
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**INTERNATIONAL
 HEADQUARTERS**
 125 Old Broad Street
 London, EC2N 1AR
 United Kingdom

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