

Viewpoints

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Could a Biden presidency and a COVID-19 vaccine make value stocks the next market winners?

Boston - Value and growth can take many different forms, but for most of 2020 the mega cap US technology companies have led the markets. While these are all great businesses, I think their rich valuations can be explained by using lower interest rates today to discount their future cash flows back to a higher present value. That's just basic valuation math.

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