



January 2024 Newsletter

2024 is getting off to a fast start. With that said, I would like to share some insights into this year.

The economic distortions of the past few years have produced tectonic shifts in the global investment landscape. The massive fiscal stimulus and near-zero interest rates seen during the pandemic have given way to tighter monetary policies and sharply higher bond yields.

Attractive fixed income yields should support bonds, with improved credit quality helping keep defaults relatively low. Shorter-term bonds also appear to offer opportunities. Careful attention to issuer fundamentals will be critical in the year ahead.

The global equity rebound in 2023 was dominated by a handful of mega-cap U.S. technology stocks. But positive fundamentals in some regional markets and innovations in other key sectors could help expand the opportunity set this year.

Monetary policy effects typically are felt with a lag, so global economic growth remains at risk. The eurozone is already in a recession, and China's post-pandemic recovery has been disappointing. However, the U.S. economic outlook is more encouraging, as corporations and consumers both have proven less sensitive to higher rates compared with other major global economies. This is something we are watching closely.



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Here are some articles you might find interesting. Please let me know if you have any questions or thoughts.

Thank you,

Peter



Investors' Hope for 2024: A Return to Long-Lost Normalcy

Jan. 2, 2024



Many think markets can find a more stable equilibrium after recent rate increases.

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What we really know about the global economy

Jan. 16, 2024

FT

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A Turbulent Year May Lie Ahead—CEOs at Davos Are Optimistic

Jan. 16, 2024



High-net worth families are racing against the clock to shield their wealth before the estate tax increases

Jan. 15, 2024



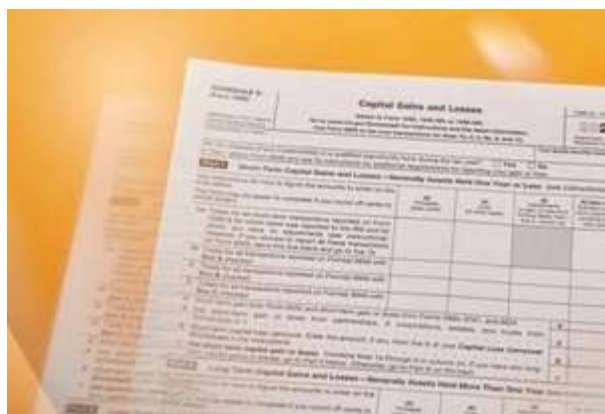
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What the 2024 Capital-Gains Tax Brackets Mean for Your Investments

Jan. 9, 2024



How capital-gains tax rates work, depending on your income.

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Jan. 10, 2024



These top 10 predictions for 2024 focus on how current trends will evolve, with the price of...

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Jan. 15, 2024



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Jan. 8, 2024



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