

Macro Matters: Midyear Outlook 2024

As we reach the middle of 2024, where do our experts think you should focus portfolios given shifting rate expectations, sticky inflation, and global uncertainties? Follow the insight to find out more.

Authors	Date	Topic
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Key takeaways

- While U.S. and international growth should slow, the slowdown will be faster internationally. International markets also should progress more quickly toward inflation targets.
- Fixed income investors should expect further progress toward interest rate normalization. We suggest considering front-end focus, multi-sector strategies, and a high-quality bias.
- We believe equity investors should stay focused on quality with volatility ahead. Learn what this means to our investment teams and how they identify quality companies.

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