

Markets and economy · é¢

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Markets and economy

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No rate-hiking map from the Federal Reserve Higher bond yields and resilient markets may shape the investment outlook as investors adjust to less forward guidance from the Fed.

AUGUST 31, 2026

Don't let debt fears derail market perspective Higher debt and rates are grabbing headlines, but earnings strength and market resilience may matter more for long-term investors.

AUGUST 24, 2026

Above the Noise: AI, earnings, and permabears Market trends such as AI demand, earnings growth, broader participation, flat oil, and resilient growth may push back on bearish narratives.

AUGUST 21, 2026

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New Treasury buyback eases 'debt reckoning' worries The US Treasury debt buyback plan illustrates that the government is unlikely to sit back and allow a disorderly debt crisis to unfold.

AUGUST 19, 2026

Bears beware: Case for bull market momentum The bull market has challenged the bears as AI demand has risen, earnings have improved, and market breadth has expanded.

AUGUST 17, 2026

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Why market headlines may miss the bigger picture Investors may benefit from looking past dramatic market headlines and focusing on economic growth, earnings, and the bigger market picture.

AUGUST 10, 2026

Is the angst over AI spending and Fed inaction warranted? Investors are concerned that artificial intelligence spending is too high and that the Federal Reserve is behind the curve in fighting inflation. But what does the evidence say?

AUGUST 3, 2026

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What is an exchange-traded fund (ETF), and how can you invest? An exchange-traded fund (ETF) is a basket of stocks, bonds, or other securities that trades on an exchange like an individual stock.

JULY 30, 2026

Why market volatility may be part of the bull case Markets may face AI skepticism, inflation worries, and geopolitical risks, but the bull market still looks intact amid resilient growth.

JULY 27, 2026

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Above the Noise: Look beyond AI pullback AI-related stocks have been volatile, but earnings have remained resilient, leadership has broadened beyond tech stocks, and inflation has cooled.

JULY 24, 2026

Bull market check-in: Key signals to watch Bull markets don't end because someone says they will. They've typically tended to end when fundamentals deteriorated, which we haven't seen.

JULY 20, 2026

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Siren songs: AI, inflation, and the Fed's next move AI demand, energy risks, and inflation pressures test market resilience and the Federal Reserve's outlook on monetary policy.

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