November 9, 2021

BILBoard November 2021 – Contrasting views of the world

Bond and equity markets paint contrasting pictures. The fixed income world has undergone aggressive repricing with investors taking a bleak view of the world, focusing on stickier inflation, persistent supply-side issues and imminent tightening of monetary policy by central banks. Conversely, stocks are again close to all-time highs as companies report stronger-than-expected profits for the summer. Read our latest BILBoard to find out how we are positioning our portfolios in such a context - NL EN FR DE LU

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