

Glasses Half Full (Last of a Series)

THE LEAD | April 7, 2023

In conversations with dozens of institutional investors over the past several months, consistent themes recur. First, there's the sense of continually being bombarded by unexpected bad news rocking markets...

?? Read Mar 27 2023 newsletter: [here](#)

?? Chart of the Week: [here](#) (by Lincoln Proprietary Database (Interest Coverage Ratio = Ebitda – Capex/Actual LTM Interest))

(Any “forward-looking” information may include, among other things, projections, forecasts, estimates of market returns, and proposed or expected portfolio composition Past performance is no guarantee of future results. Investing involves risk; principal loss is possible.)