Letter from Down Under (Second of Two Parts)

THE LEAD | May 25, 2023

In our various overseas meetings over the past six months with institutional investors in the Middle East, Japan, UK, Germany, Belgium, Switzerland, Singapore and, most recently, Australia, consistent themes arise…

?? Read May 15 2023 newsletter: here

?? Chart of the Week: here *(by Investment Magazine)*

(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.)