Letter from Seoul (Second of Two Parts)

THE LEAD | June 8, 2023

"Private credit is the only bright spot in asset allocation right now." The themes around private credit of consistent returns, valuation stability and low-risk portfolios were repeatedly underlined in the twenty or so meetings we had with investors in our weeklong trip around Seoul, South Korea…

?? Read May 29 2023 newsletter: here

?? Chart of the Week: here *(by Preqin Pro)*

(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.)