THE LEAD
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Why so sensitive?

THE LEAD | September 19, 2024

As we head to our end of summer break, let's reflect on three things that will not change. First, rate expectations are headed lower, beginning next month; likely to include at least one more cut before the end of the year. It's also clear that pattern will continue into 2025.

Second, the economy will continue to grow, albeit slowly. Business services will lead the way, along with other defensive sectors such as healthcare, technology, and software. The consumer is still spending, though sentiment remains cautious…

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