

▶ **Appreciation Strategy Overview**



📄 **Latest Low Volatility Insights**



Taking Charge: Card Issuers Growing in Uncertain Rate Setting

Growing digitization of payments and e-commerce are increasing consumer credit card utilization, benefiting card issuers and payment networks.



Morningstar on the Appreciation and Dividend Strategies

Morningstar's Andrew Daniels highlights the similarities and differences between the Appreciation and Dividend Strategies.

Perspectives



Low Volatility Not a Warning Sign for Stocks

A measured rise in volatility could be conducive to active strategies driven by stock selection.



Passive ETF Distortions Create Opportunities for Active Management

The proliferation of passively-managed ETFs could create opportunities for active managers.



High Conviction Active Management Asserts Strength Over Time

Active strategies with lower turnover and greater concentration have stood out over the last decade.



Taking an Active Approach to Managing Volatility

PM Michael Kagan joins Investment Strategist Jeffrey Schulze to discuss active low volatility strategies in the current market environment.

▶ **Jeffrey Schulze on AssetTV Active Management Panel**

Investment Strategist Jeffrey Schulze, CFA joined AssetTV's Active Management panel to discuss the potential benefits and opportunities for active management in today's equity market.

For equity exposure with lower variability of returns, an active focus on risk management can help. These strategies cultivate consistent results delivered with greater attention to downside protection through investment in high-quality companies with leading market positions.

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