ClearBridge Investments

Related Perspectives

International Growth Strategy
2Q20 Commentary: Stay-at-home orders have accelerated secular growth trends where the portfolio is well-exposed.

Large Cap Growth Strategy
2Q20 Commentary: We have added cyclicality and consolidated positions to be more leveraged to a recovery.

Select Strategy Update
Portfolio Manager Aram Green highlights the disruptive companies that led robust 2Q performance and where he sees opportunities as the economy reopens.

Dividend Strategy
2Q20 Commentary: Loose monetary policy and generous fiscal transfers led to a rally of questionable durability.

Appreciation Strategy Update
PM Michael Kagan dissects drivers of market and portfolio returns and the potential for a return to cyclical stocks.

Scott Glasser
Chief Investment Officer, Portfolio Manager
30 Years experience 28 Years at ClearBridge

Jeffrey Schulze, CFA
Investment Strategist
16 Years experience 7 Years at ClearBridge

Co-Chief Investment Officer Scott Glasser joins Investment Strategist Jeff Schulze to debate the unprecedented moves in the market and economy in response to the COVID-19 pandemic and the risks and opportunities they are monitoring as we enter the second half of 2020. Scott and Jeff highlight the importance of liquidity from further policy stimulus, the potential for a change in market leadership and the likely impact of the presidential election.