ClearBridge Investments

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AOR Update: The More Things Change...
The disappointing August jobs report was primarily due to the Delta variant, but sets up a potential goldilocks scenario for investors.

AOR Update: Mid-Cycle Transition No Reason to Sell
Recent economic expansions have lengthened with recessions occurring less frequently, suggesting another extended period of growth ahead.

Anatomy of a Recession: 3Q21 Update
Jeff Schulze and Josh Jamner address marginal changes to their bullish economic and market outlook as the expansion transitions to mid cycle.

While the outcome of the 2020 presidential race remains undecided as of today, ClearBridge Co-Chief Investment Officer Scott Glasser explains in a Franklin Templeton 2020 Election Investment Pulse panel that election results so far have removed several key risks for equities, most notably the threat of higher taxes from a Democratic sweep. Initial market reaction has been positive, indicating a preference for a divided government that is still likely to pass an additional stimulus bill.

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30 Years experience 28 Years at ClearBridge