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 **An Active Bet on Emissions Reductions in Energy Sector**

The complexity of the energy transition is being underestimated, with the potential for a full-blown energy crisis this winter.

 **AOR Update: Red Light, Green Light**

Despite stagflation risks, solid 3Q earnings and a green signal for the ClearBridge Recession Risk Dashboard suggest the economy remains robust.

 **Actively Managing Mega Cap Exposure**

Our structural underweight to mega caps is motivated by a desire to maintain portfolio diversification and target a greater number of growth opportunities.

 **Enterprise Software Offers Differentiated Growth**

Recent positioning moves have better targeted our focus on software companies with the most compelling risk/reward profiles.

 **Pet Pampering Putting Bark into Spending**

Shifts in consumer attitudes toward pets have sparked greater demand for premium nutritional products, veterinary and related services.

[RARE Infrastructure](#) Senior Portfolio Manager Shane Hurst and Head of Global Distribution Matt Bushby dissect what infrastructure assets outperformed and underperformed as investors brought capital back into areas sold off in March. Shane also highlights the opportunity opened by recent volatility to increase investments in sustainable infrastructure assets.

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