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Investors may be underreacting to risks that the past growth cycle is changing.

 **Cash Flows the Best Antidote to Speculation**
While speculative stocks run the risk of permanently destroying capital, stocks with recurring cash flows offer similarly attractive returns.

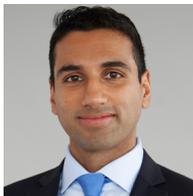
 **Alzheimer's Approval Validates Biopharmaceutical Innovation**
The FDA decision should be broadly supportive as it signals the agency is willing to be flexible to make important drugs available to patients.

 **Could Job Flexibility Be Turning Point for Working Women?**
An increasing shift towards greater workplace flexibility should encourage more women to return to the workforce and could boost economic growth.

 **Equity Duration Should Reinforce Value Rotation**
Equity duration will matter more as reopening pushes up interest rates.



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Research analysts Kimberly Gifford and Deepon Nag join host Jeffrey Schulze to discuss how ClearBridge's ESG investment framework aligns with the U.N. Sustainable Development Goals (SDGs). They explain what the SDGs mean in the context of their fundamental company research and ClearBridge's approach to ESG integration. The role of active managers in furthering the SDGs is one of many topics treated in the 2021 ClearBridge Impact Report.

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