

VIDEO FLASH: WHILE INFLATION CONCERNS RAMP, U MICH SURVEYS SHOW INFLATION EXPECTATIONS SITTING NEAR LONG-TERM TRENDS. OUR CONTRARIAN TAKE REMAINS THAT SEPT IS AN UP MONTH



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HEAD OF RESEARCH

VIDEO: Today, a chorus of pundits and strategists have warned of a down Sept. And we realize the seasonality shows this to be the case, as Sept is historically the worst month for stocks, and even true in midterm years. But we believe the pivot point is that the stock market has inflation derangement syndrome. And when this pivots, stocks will rally. We see this happening this month.

More in today's Macro Minute video linked here (duration: 4:56).



Week of 8/31 - 9/4:



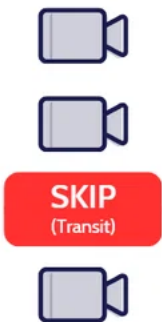
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FLASH
Report

Macro Minute
Video

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