

GLOBAL CIO WEEKLY

We Need Central Banks to Step on the Gas

by Gary Dugan



Key Takeaways >>>



Investors fret that US economic data does not emphatically push the Fed to provide a 50bps rate cut this month.




Marked profit-taking in the equity markets suggests that investors want to see an acceleration of monetary easing.



A slow pace of monetary easing is a concern for many who worry about the impact of high rates on sectors such as commercial real estate.



Large cash balances provide support for bonds.



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