

## June Newsletter

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Summer is here. The June edition of my newsletter highlights education planning strategies, mid-year outlook, and market insights. If you know anyone who would benefit from this newsletter, please pass it along. If you need anything at all, please reach out.



### The Rally Is Back, But Risks Are Rising

The speed of the equity rebound is impressive, but the bigger question for investors is what's powering it—and what could derail it.

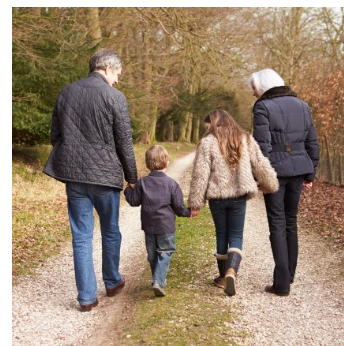
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### 2026 Midyear Investment Outlook: Constructive, Not Complacent

AI infrastructure investment is boosting the outlook for risk assets, particularly U.S. equities, despite geopolitical risks. Credit markets could face challenges as companies increase bond issuance.

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### Midyear Economic Outlook: AI Drives Resilient Growth

Growth softens in the second half of 2026, hurt by higher energy prices, but recovers in 2027 in a baseline outlook that includes a resolution of the oil supply shock.

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### A Larger, Broader IPO Market Takes Shape

As IPOs gain momentum in 2026, larger and later stage companies are coming to market across sectors. Financial sponsors, retail investors and multiple capital-raising channels are shaping this year's equity issuance landscape.

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### 5 Things You May Not Know About 529s (But Should)

They're tax friendly, flexible, and available to anyone. Yet, 529 education investment plans are still underused. Here are five things that parents, grandparents, and anyone hoping to get a leg up on education costs need to know.

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