

Below is the May edition of my newsletter. If you would like to connect about any of the information below, please reach out. If you know anyone who may benefit from this newsletter, feel free to share it.



**Mega Themes Converge to Outperform Markets**

Morgan Stanley’s four key investment themes for 2026—AI & Tech Diffusion, the Future of Energy, a Multipolar World and Societal Shifts—are beating benchmarks as their intersections accelerate market impact.

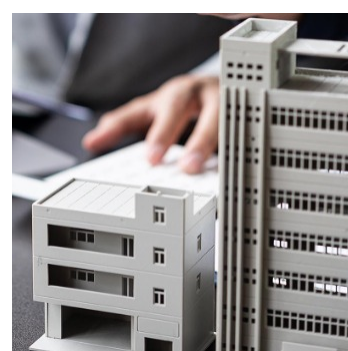
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**Iran Conflict Unsettles Market Norms**

The war has rattled stocks and shaken expectations about the usual market “rules.” Here’s what investors can learn from the episode.

[Read Here](#)



**A Turning Point for Real Estate: Recovery Takes Shape**

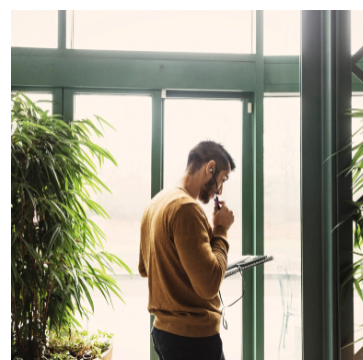
Real estate markets are showing signs of recovery, with stronger fundamentals, renewed transaction activity and select opportunities emerging.

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**Coming Into Money**

If you’re receiving a windfall, this article outlines first steps to consider—planning, tax-aware decisions, and common pitfalls to avoid.

[Read Here](#)

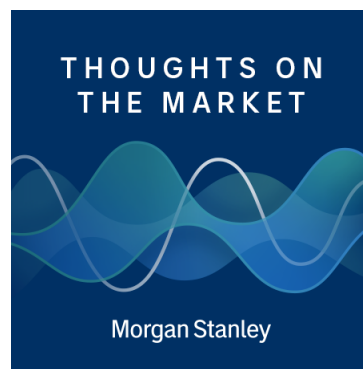


**Thoughts on the Market**

**Making Sense of Mixed Market Signals**

Despite a historic disruption to global energy markets, the stock market remains resilient. Our Global Head of Fixed Income Research Andrew Sheets suggests U.S. markets may offer a steady course in the near term.

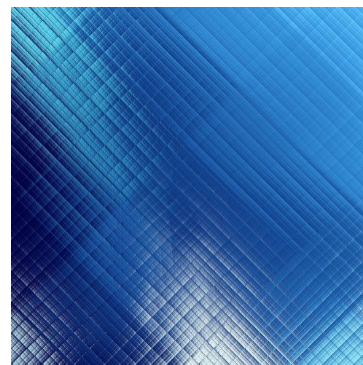
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**Warsh’s Plan to Change the Fed**

Kevin Warsh, President’s Trump’s nominee for the next Fed Chair, testified in front of the Senate earlier this week. Our Global Head of Fixed Income Research Andrew Sheets presents key takeaways from the two-and-half-hour testimony.

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