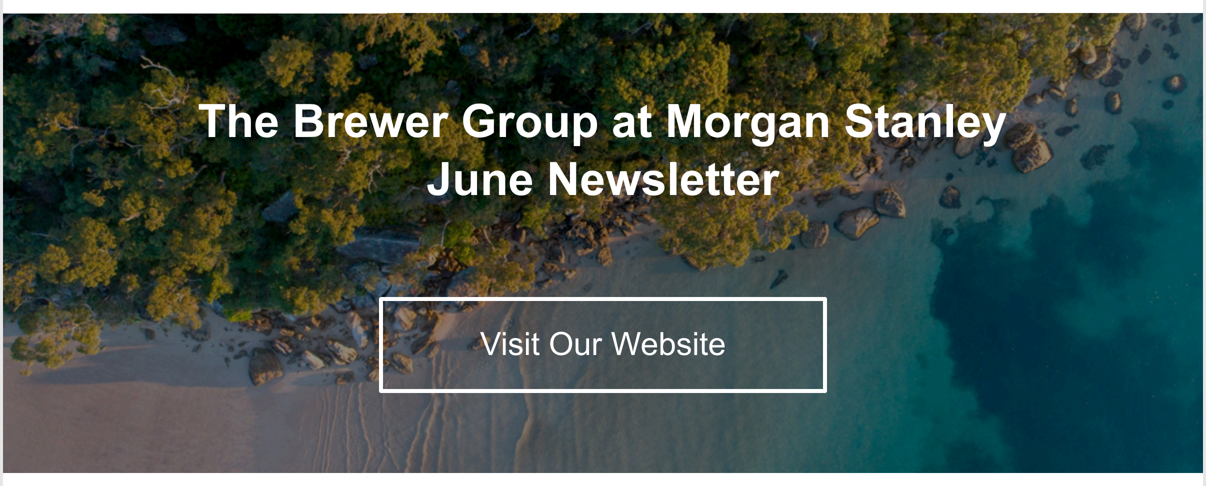


Welcome to our June Newsletter from The Brewer Group at Morgan Stanley. In this edition, you'll find timely investor resources including the 2026 Midyear Investment Outlook, a guide to understanding IPOs, and highlights from The Alts Report on trends shaping the alternative investments landscape . We've also included a practical Mid-Year 2026 Checklist with five planning items to consider, plus a quick "On the Markets" update.

We hope you find these resources insightful, please feel free to reach out with any questions or if you would like to discuss further.

## INVESTOR RESOURCES

### 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.

Continue to Article >

### Understanding IPOs: From Prospectus to Participation

For investors, IPOs can offer early access to innovative companies, but they come with risks. Here's what to know about investing in companies that are going public.

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### The Alts Report

Hear from industry innovators across Morgan Stanley Wealth Management leadership and fund manager partners as they discuss the trends and opportunities shaping the alternative investments landscape.

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## MID-YEAR 2026 CHECKLIST

### 1. Review Your Portfolio

Mid-year is a good time to prepare for what may be ahead for markets. Please reach if you would like to review your portfolio.

### 2. Check-In On Your Retirement Plan

Given recent market volatility, it's crucial to see how you're tracking toward the goal of a financially secure retirement. A mid-year review is a great time to assess where you stand. If you are off-track, work with me to determine why you may be.

### 3. Revisit Your Insurance Needs

While priorities like budgeting and taxes often take center stage at the beginning or end of the year, summer can be an ideal time to focus on areas of your financial life that may otherwise get overlooked. For many people, insurance coverage is one of those areas.

### 4. Refresh Your Estate Plan

It's important to periodically review estate planning documents closely, especially if you're in retirement. While often challenging, this type of planning is essential if you hope to ease a difficult process for the people you love and to help ensure that your wishes are respected.

### 5. Identify New Tax-Savings Strategies

Examining your tax return may reveal opportunities to save money hidden between its lines. You may be surprised by what you find.

## On the Markets | Broadening?

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## FROM THE BREWER GROUP

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