

The Johnson Group at Morgan Stanley February Newsletter

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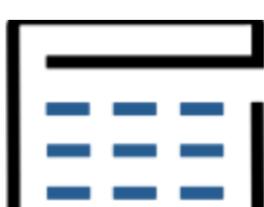
Welcome to our February Newsletter! We're pleased to share a few timely updates and resources to help keep you informed and supported. This edition includes a team update, instructions on how to access your tax forms, and a look ahead with market outlook perspectives for 2026. You'll also find a new episode of *Exceptional Leaders*, an article exploring mortgage considerations for 2026, and this month's On the Markets.

TEAM UPDATE FROM MICHAEL:



Over a week ago, I had the opportunity to compete in a HYROX race in Phoenix, Arizona, and it was an incredible experience. The competition was a powerful reminder of the discipline, sacrifice, and hard work it takes to reach meaningful goals, all values that have stayed with me since being an athlete. It was inspiring to see how those same lessons still apply today, both in my personal life and professional career.

INVESTOR RESOURCES



Tax Tips 2026: How to Prepare for Tax Day | Morgan Stanley

Explore Morgan Stanley's latest insights on the stock market outlook for 2026, highlighting key trends and investment strategies to navigate the evolving financial landscape. Stay informed and prepared for the year ahead.

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Four Key Themes Shaping Markets in 2026

Our Global Head of Thematic and Sustainability Research Stephen Byrd discusses Morgan Stanley's key investment themes for this year and how they're influencing markets and economies.

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Exceptional Leaders: The Coca-Cola Company

In this episode of *Exceptional Leaders*, analyst Dara Mohsenian visits the company's Atlanta headquarters to explore its evolution.

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Will Mortgage Rates Go Down in 2026?

Mortgage rates are forecast to decline in 2026, improving housing affordability, but challenges persist for prospective buyers.

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HOW TO ACCESS YOUR TAX FORMS

Click [here](#) for instructions on how to access your tax forms.

On the Markets New Year, New Tune

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FROM OUR TEAM

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