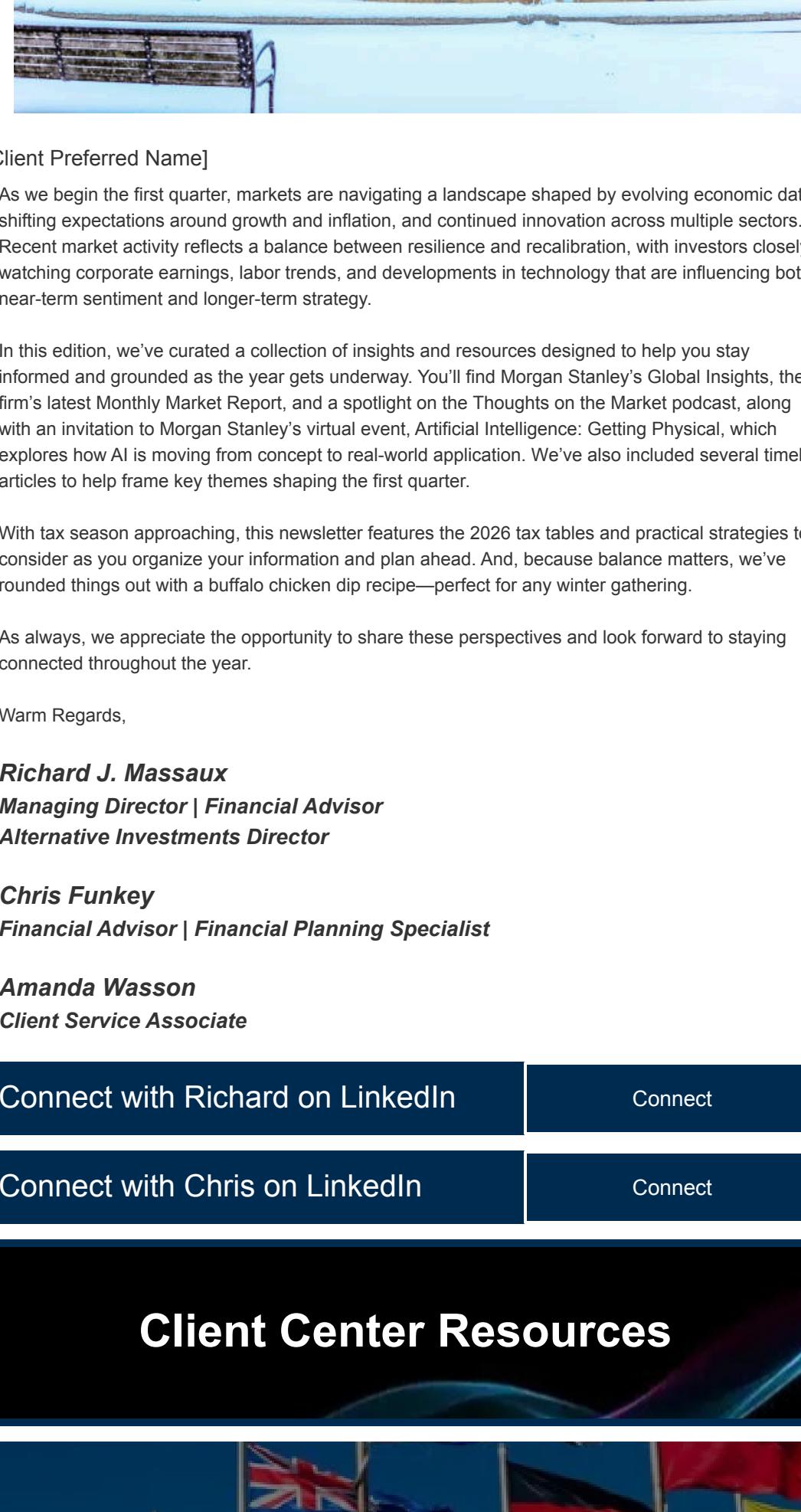


The Massaux Group

First Quarter Newsletter



[Client Preferred Name]

As we begin the first quarter, markets are navigating a landscape shaped by evolving economic data, shifting expectations around growth and inflation, and continued innovation across multiple sectors. Recent market activity reflects a balance between resilience and recalibration, with investors closely watching corporate earnings, labor trends, and developments in technology that are influencing both near-term sentiment and longer-term strategy.

In this edition, we've curated a collection of insights and resources designed to help you stay informed and grounded as the year gets underway. You'll find Morgan Stanley's Global Insights, the firm's latest Monthly Market Report, and a spotlight on the Thoughts on the Market podcast, along with an invitation to Morgan Stanley's virtual event, Artificial Intelligence: Getting Physical, which explores how AI is moving from concept to real-world application. We've also included several timely articles to help frame key themes shaping the first quarter.

With tax season approaching, this newsletter features the 2026 tax tables and practical strategies to consider as you organize your information and plan ahead. And, because balance matters, we've rounded things out with a buffalo chicken dip recipe—perfect for any winter gathering.

As always, we appreciate the opportunity to share these perspectives and look forward to staying connected throughout the year.

Warm Regards,

Richard J. Massaux
Managing Director | Financial Advisor
Alternative Investments Director

Chris Funkey
Financial Advisor | Financial Planning Specialist

Amanda Wesson
Client Service Associate

Connect with Richard on LinkedIn

Connect

Connect with Chris on LinkedIn

Connect

Client Center Resources

Global Insights

Five Themes to Watch in 2026

[Read Report](#)The Robots Are Coming:
Artificial Intelligence Gets Physical

Virtual Event

[Register](#)

AI Boom Drives Thematic Investment

Four Key Investment Themes for 2026

Contrarian Views That Could Shape Markets in 2026

At Morgan Stanley's 2025 Thematic Conference, leaders emphasized AI's role in influencing structural changes across industries and in the global economy.

Morgan Stanley Research's key investment themes for this year are Tech Diffusion, The Future of Energy, The Multipolar World and Societal Shifts.

In its annual "Big Debates" series, Morgan Stanley Research identifies opportunities across sectors and regions where the firm's views point in different directions than the current market consensus.

[Learn More](#)

[Learn More](#)

[Learn More](#)

Tax Season Resources

[2026 Tax Tables](#)[Are You Prepared for Tax Day?](#)

Buffalo Chicken Dip

[View Recipe](#)

Pet Updates from The Team

New firmware installed. Treat recognition: 100%. Listening mode: still loading...

[Signature of Primary Contact]

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Investor's individual circumstances and objectives. All opinions are subject to change prior to or sale of the investment.

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that investors consider the objectives, evaluate a particular investment, and depend upon an investor's individual financial circumstances and objectives.

Because many sectors and companies, investments tend to be more volatile than investments that diversify

investment risk.

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