



The Nova Ridge Group at Morgan Stanley September Newsletter

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INSIGHTS



US Policy Pulse | Defense on the Fiscal Frontlines

In this report, we discuss the evolving defense policy landscape and what it may mean for the economy and financial markets.

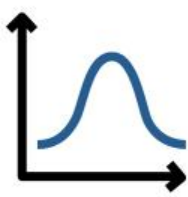
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Why Selectivity Matters in Today's Markets

Higher rates and sharper scrutiny of AI investments are raising the bar for companies and rewarding discerning investors.

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What Could Shake Up Markets in September?

Investors have plenty to digest this month, from economic data to central-bank decisions. Our Global Head of Fixed Income Research Andrew Sheets outlines what could drive the next bout of volatility.

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Fixed Income Outlook: A World of Increasing Dispersion

Dynamics that drive global economic growth and markets are becoming more uneven, making active management increasingly important for fixed income investors.

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September On The Markets | Micro and Macro

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70 Tailgating Recipes for the Perfect Pre-Game Spread

As the NFL season kicks off, we wanted to share a fun resource to help make game days even more enjoyable. Check out these **70 Tailgating Recipes for the Perfect Pre-Game Spread** —we hope a few of these ideas come in handy throughout the season!

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Pictured above from left to right: Scott Johnson - Senior Registered Associate, Melissa Barajas-Gutierrez - Senior Client Associate, Warren Duff - Financial Advisor, Kelly Peterson - Financial Advisor.

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