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An All-Weather Asset Class: Private Debt Managers Invest Amid Rate and Tariff Uncertainties

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Our commentary at Aug 5 2019 deals with the first fed rate cuts in over a decade, and the latest round of tariffs on China. How much weight will this uncertainty bear on the credit markets? A lot depends on whether this latest trade volley will be softened or retracted down the road. Depending on what happens next, the Fed's next move might not be insurance against a slowdown, but a more vigorous whack at interest rates.

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