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MARKET SIGHT LINES

An Overview of Our Insights

By Michael O'Keeffe, *Chief Investment Officer*

I am traveling this week, and I thought it might be helpful to take the opportunity to provide an overview of the Stifel CIO Office insights we produce for our financial advisors and clients. So, in this week's Sight|Lines, we explain how we organize this work and provide live links so you can review these insights.

Annual Outlook

Each January, our *Annual Outlook* sets the stage for the coming year. This year's report, Outlook 2022: Balancing Acts, includes a review of 2021, an outlook for 2022, and a series of topical articles. We also offer an associated video and client webinar each year.

Market Performance

The *Market Perspectives* series provides a recap of recent market results. Our weekly and monthly series offer a quick summary, while the quarterly editions go more in depth.

Market Pulse is available just after the close on any day the S&P 500 Index moves up or down 2% or more.

Weekly Content

Market Sight|Lines is a weekly note, video, and podcast offering a key insight amid the roar of market noise.

The *CIO Weekly* provides a summary and live links to our most important work from the last week.

Stifel Bits is a weekly e-mail that takes a breezy, lighthearted approach to our insights.

Monthly Content

The *Investment Strategy Brief* video, deck, and podcast share our thinking on the current economic and market environment.

Favorite 15 is a slide deck containing our 15 favorite slides from our work over the last month.

Quarterly Content

As mentioned above, our *Quarterly Market Perspectives* provides an in-depth recap of market results over the last quarter.

Allocation Insights explains our dynamic asset allocation leanings given the current environment.

Evergreen Content

Stifel's *Approach to Asset Allocation* summarizes our asset allocation approach and provides a catalog of various recommended asset mix models.

Our *Financial ID* video series provides an overview of our work in behavioral finance and the related Stifel Financial ID model.

Podcasts

The weekly *Sight|Lines Podcast* offers a quick 5-to-10-minute summary of our weekly Sight|Lines note to clients. Subscribe: Apple, Google, Spotify.

The monthly *Investment Strategy Brief Podcast* provides a 20-minute overview of our thinking on the current economic and market environment. Subscribe: Apple, Google, Spotify.

The *Conversations Podcast* features leaders from Stifel and the finance industry more broadly, offering thought-provoking conversations about the current environment and investing. Subscribe: Apple, Google, Spotify.

Summary

Sometimes people ask: What is the most convenient way to view your most important work? You can speak with your financial advisor about subscribing to *CIO Weekly*, a weekly e-mail summarizing our most recent work and providing links to go deeper.

The Stifel CIO Office offers insights for our financial advisors and clients. We hope you find this overview helpful.

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