MENU

Baystate Wealth Management specializes in creating and managing customized portfolios for discerning clients who are looking for personalized wealth management services from experienced people they can trust. By combining our high-touch approach with our diversified portfolios, we are able to provide appropriate risk-adjusted returns over several market cycles.

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Anchors & Dream Boxes

Volatility, noise, tweets, and fear are all on an uptick. Recession concerns, trade wars, cold wars, hot wars, oil price volatility, Fed Rate Hikes, Fed Rate Cuts, amongst other headlines in the 24-hour news cycle can create some short-term noise in the markets. It is natural to read a compelling headline, or maybe even an entire article on any given subject and feel an urge to act. It almost makes one yearn for the days when the news was delivered by paper route or consolidated into a single nightly news program. Back to the days when stock market moves were heard on the nightly news and account balances and performance were only known monthly, and not minute-by-minute with every tick.

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PM REPORTS

We Are All in This Together

This month's topic is Global Economic Connectivity: a term I may have heard before and internalized or possibly just made up. In any event, this report will focus on the extent to which economies and businesses across the globe are intertwined and inherently connected. This global connection (globalization) even applies to businesses and individuals living and operating solely within their own countries' borders. Undeniably, we live in a global marketplace and we are all in this together.

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Quarterly Positioning Report

Memories of the dark days that made up the fourth quarter for risk markets may be all but forgotten. That is considering that the stock market is off to its best start since 1998. Unlike the start of 2018, when risk markets ran up to only fizzle out quickly at the end of January, it was all "green" for risk assets to start this year, with a continued push through the end of March.

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The genesis for this month's topic is a telephone call with a Financial Advisor in the area. Not long ago I connected with this advisor to discuss a few clients and catch up on the markets in general.

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PM REPORTS

Looking Backwards and Forwards

Happy New Year! As we do every year, our January report is dedicated to looking back and critically reviewing our outlook from a year ago, as well as expressing our views going forward. For last year's report please visit our website at www.baystatewealth.com.

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PM REPORTS

A December to Remember

Considering the recent market activity, this month's PM report will go outside of our normal protocol, which is to examine or reference data as of the prior month's close. At this point in the month, we find ourselves discussing the December market activity at some length with clients and feel as though it is important to discuss broad views in a more formal context.

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Please review **Important Disclosure Information** set forth in the last section of this web site.

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