

UNICOMPROMISMIG. AND UNICOMPROMISED.

We help institutional clients achieve their unique goals with thoughtful investment advice, delivered with integrity.

DEAD MODE

CURRENT MARKET SNAPSHOT

Sellwood 3.6% U.S. stocks are off to their best start to a year since 1997, as the 58P 500 nose 4.3% in the second quarter is 18.5% in the first half of 2015. The rolls followed a disappointing fourth quarter of 2018, in which investors the about finder ware, slowing pilotal provide, and the future path of Federal Reserve policy. Each of those thems their part to play in the second quarter. MSCI All Country World 88P 500 Farmel 2000 2.1% 17% MSCI Enwrains Markets 0.0% The doubt shift in messaging from the Finderal Peterne has done little to appease Precident Tourg, who has repeatedly citalled for rate cash over the past several morths. Observant Power has referred the importance of certain basis independence. Julic has not may be borded, particularly induse as un certain begins to single down global growth. The bond rasked is outside, autopating but the next stressed rate move will be down, not up. The John Tourseap's selection for the several results as under the review and the particular to the particular to the several results are presented as the reviewed results of 50%, blook the current Federal Funds the storage, and statem residests are before you the liabilition of differe to tour rate ruits out on the relation of the results are supported with the downward more in pasts, and fungs affecting the cases outperformed. 13% BilgBarc US Teasury 3.0% 2.6% Bilglan: Long US Gov Cred BBgBart US TIPS 29% 41%

JUNE 2019

RECENT RESEARCH



TEN YEARS, TEN OBSERVATIONS, AND TEN PREDICTIONS



MODELING THE REALITY OF RISK IN 2019

APRIL 12, 2019



2019 CAPITAL MARKET ASSUMPTIONS

MARCH 19, 2019



RISE AND SHINE: WHY BOND INVESTORS STILL SHOULDN'T FEAR RISING RATES

MARCH 7, 2018

OUR TEAM

The Sellwood Consulting team has consulted to a broad range of institutional investors, including some of the largest portfolios in the country. Our senior team has worked closely together since 2005.













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SELLWOOD INSIGHTS





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