

BNN MARKET CALL

eResearch Corporation is pleased to provide an excerpt from Friday's BNN Market Call Newsletter.

It features the Market Outlook from a leading investment analyst with a commentary (see below) and a 45-minute video interview (see link [HERE](#)).

MARKET OUTLOOK

Geoff Scott, institutional portfolio manager at Cambridge Global Asset Management
Focus: North American equities

We entered 2018 with a conservative posture across our portfolios. The elevated levels of volatility we have experienced so far this year have provided an opportunity to selectively deploy capital into new and existing positions at valuation levels that were more attractive.

As a result, our cash levels have declined across our Canadian, U.S., and global portfolios.

Central banks globally are responding to the improved economic backdrop and are raising interest rates or slowing asset purchases through their respective quantitative easing programs. There continues to be risks that this withdrawal of stimulus will not be a smooth process and equity market volatility will continue.

As we navigate this market turbulence, we will remain disciplined to our bottom-up fundamental investment process and focused on delivering strong risk-adjusted returns to our clients.

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Bob Weir, CFA, Director of Research

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