

## **BNN BLOOMBERG MARKET CALL**

**eResearch Corporation** is pleased to provide two excerpts from Friday's BNN Bloomberg Market Call Newsletter.

Set out below are the respective Market Outlook commentaries from two leading investment analysts, plus Links to their respective 45-minute video interviews.

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### **MARKET OUTLOOK**

**Fabrice Taylor, Publisher of the President's Club Investment Letter**

**Focus: Small and Mid-Cap Canadian Equities**

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It has been ten years since the bull market started and we have had low/falling interest rates for even longer. Most investors don't know what rising interest rates will do, especially to one of the biggest and longest bull markets on record. It is safe to say falling rates fueled the run in stocks, so if they do start to rise (which is debatable), there could be more carnage.

A good place to hide, as much as possible, is in stocks that are uncorrelated to the market. These would be stocks with specific catalysts that can move them higher even in a falling market: e.g., turnarounds or disruptors. These are riskier by nature, and they are not immune from a broad sell-off, but they can buck the trend. With cash returns (GICs and money market funds) increasing, it is not a bad place to hide even at 3 per cent if the alternative is more market carnage.

**VIDEO:** Fabrice Taylor's 45-Minute Video Interview <CTRL-CLICK> [HERE](#)

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## MARKET OUTLOOK

**David Cockfield, Managing Director and Portfolio Manager at Northland Wealth Management**

**Focus: Canadian Equities and ETFs**

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Equity markets are presently recovering from a significant market correction. Despite concerns about politics, interest rates, tariff wars, and pending recessions, the reality of high employment, rising incomes, low inflation, and good economic growth will likely drive future market action.

Market corrections are a common occurrence in equity markets and should be viewed as such. Given the relatively low yields available in fixed-income markets, investors should take advantage of good-quality, high-dividend-paying stocks that have sold off in the recent corrections.

**VIDEO:** David Cockfield's 45-Minute Video Interview <CTRL-CLICK> [HERE](#)

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