

## Research Philosophy

Our approach to research and portfolio strategy is centered around evidence-based investing. Instead of basing decisions on near-term trends or “expert” opinions, our team focuses on historical data, leading indicators, and statistical probabilities to guide core asset allocation ratings and tactical ideas. This quantitative overlay rewards facts, not opinions, and allows MarketDesk to simplify an often complicated market narrative.



### Macro Strategy

Analysis across asset classes and macro conditions. Timely strategy pieces and QuickTake commentaries to keep you ahead of the market narrative.

### Core Ratings

30+ ratings across sectors, factors, credit, and international markets. Monthly updates designed to monitor current views and inform positioning.

### Tactical Ideas

Idea generation across industries and themes. A deep dive report is published on every idea, and our team tracks the opportunity until the position is closed.

## Report Lineup

Category	Frequency	Report Title & Description
Macro	Quarterly	<b>Asset Allocator's Guide</b> — Our most read report. Quarterly roadmap to guide high-level portfolio allocations and enhance investment committee decisions.
	Bi-Weekly	<b>Strategy Snapshot</b> — Timely strategy pieces looking across asset classes and macro conditions.
	Weekly	<b>The Weekly Note</b> — Weekly report discussing timely market topics. Page 2 highlights six timely charts defining each week. Page 3 is a weekly asset class performance heatmap.
	Ad Hoc	<b>QuickTakes</b> — Quick hits on market moving topics. Meant to be read in under 3 minutes
	Monthly	<b>Monthly Roundup</b> — Highlights key trends and core ratings updates intra-quarter. Pulls together commentary from the monthly core reports. Designed for clients with limited time.
Core Ratings	Monthly	<b>Sector Insights</b> — Coverage of all 11 U.S. sectors and underlying industries. In-depth look at fundamentals, earning trends, technicals, and investor sentiment / positioning.
	Monthly	<b>Factor Views</b> — Coverage of all 8 primary equity factors. Analysis includes an in-depth look at fundamentals, earning trends, technicals, and investor positioning.
	Monthly	<b>Credit Strategy</b> — Summary of macro trends and key economic indicators across both Emerging and Developed Markets
	Monthly	<b>International Markets</b> — Summary of macro trends and key economic indicators across both Emerging and Developed Markets.
	Monthly	<b>Economic Monitor</b> — Tracks key indicators across labor markets, consumption, housing, manufacturing, and more.
Tactical	Bi-Weekly	<b>Tactical Opportunities</b> — Idea generation across industries, themes, and international regions. Full report discussing the opportunity, catalysts, risks, and portfolio implementation.
	Weekly	<b>Tradebook</b> — Performance is tracked and refreshed weekly in the Tactical Tradebook, which also includes real-time catalyst and risk updates.
	Weekly	<b>Idea Screens</b> — Efficiently find new ideas in the S&P 1500 across various methodologies, including value, momentum, earnings revisions, & more.

## Audio Versions

Enjoy podcasts? MarketDesk reports are available in audio format to be efficient with your time.



Listen to Samples

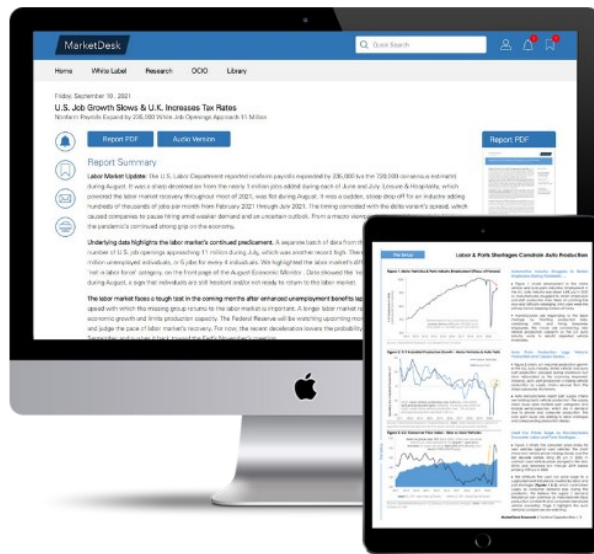
Weekly Note

Sector Insights

Tactical Opportunity

## Research Portal

The MarketDesk portal houses the full research library and allows you to bookmark reports, track tactical ideas, and set up alerts for the topics that matter most to you.



## Learn More

Experience the Platform for Yourself

Free 14-Day Trial

Schedule Demo