

Research Philosophy

Our investment approach 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 idea generation. This quantitative overlay rewards facts, not opinions.



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, themes, and equities. MarketDesk's data-driven tools help to systematically find tactical opportunities.

Report Lineup

Category	Frequency	Report Title & Description
Macro Strategy	Quarterly	Asset Allocator's Guide — Our most read report. Quarterly roadmap to guide high-level portfolio allocations and enhance investment committee decisions.
	Monthly	Monthly Roundup — Highlights key trends and core ratings updates intra-quarter. Pulls together commentary from the monthly core reports. Designed for clients with limited time.
		Strategy Snapshot — Timely strategy pieces looking across asset classes and macro conditions.
	Weekly	The Weekly Note — Weekly report discussing timely market topics. Page 2 highlights six timely charts defining each week. Page 3 is a weekly asset class performance heatmap.
Core Ratings	Monthly	Sector Insights — Coverage of all 11 U.S. sectors and underlying industries. In-depth look at fundamentals, earning trends, technicals, and investor sentiment / positioning.
		Factor Views — Coverage of all 8 primary equity factors. Analysis includes an in-depth look at fundamentals, earning trends, technicals, and investor positioning.
		Credit Strategy — Summary of macro trends and key economic indicators across both Emerging and Developed Markets
		International Markets — Summary of macro trends and key economic indicators across both Emerging and Developed Markets.
		Economic Monitor — Tracks key indicators across labor markets, consumption, housing, manufacturing, and more.
Tactical Ideas	Bi-Weekly	Tactical Tradebook — Data-driven tool to systematically find tactical opportunities.
	Weekly	U.S. Stock Scores & Idea Screens — Efficiently find new ideas in the S&P 1500 across various screens.

Audio Versions

MarketDesk reports are also available in audio format to be efficient with your time



Listen to Samples

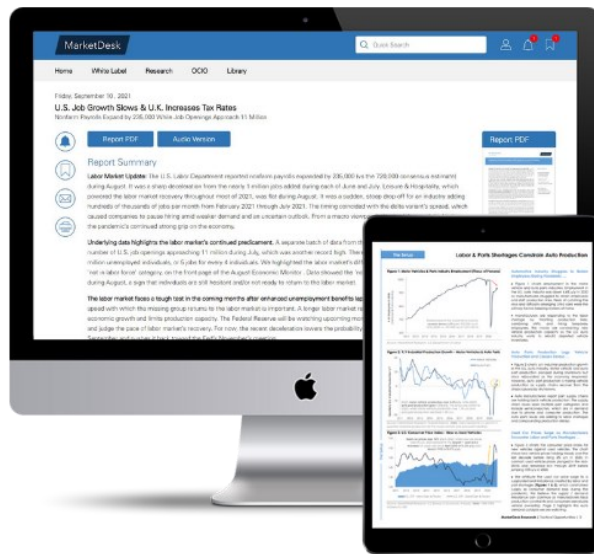
Weekly Note ►

Monthly Roundup ►

Tactical Ideas ►

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

Watch Demo ►