

Welcome Packet

See Why 150+ RIAs Partner with MarketDesk

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Schedule Demo

MarketDesk Firm Overview

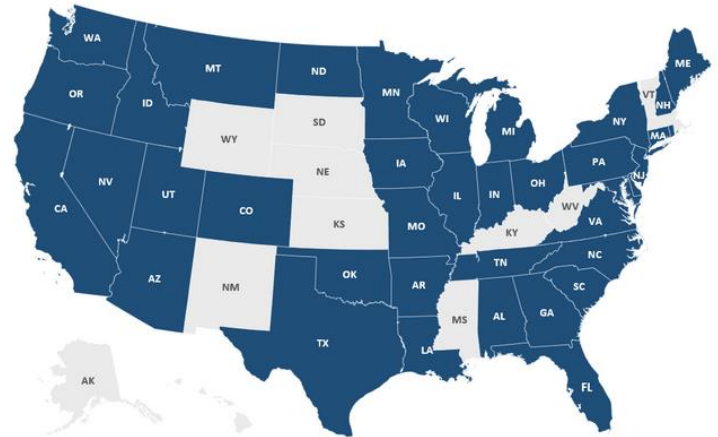
Founded in 2019, **MarketDesk provides financial advisors with a full suite of institutional tools to scale their businesses, save time, and enhance their client offerings**. Our platform is designed to serve as a seamless extension of your team, expanding your portfolio management and client communication capabilities virtually overnight.

MarketDesk adds efficiency to your existing workflows with turnkey solutions ranging from white label client insights to data-driven model portfolios.

Trusted by 150+ wealth management firms, we are committed to helping you grow your wealth management business.

Who We Serve

Trusted by 150+ wealth management firms in 43 states



The 3-Step Workflow

All three MarketDesk solutions are built to work seamlessly together. MarketDesk offers you the opportunity to **save time and refocus on growing your business**. Our full suite of solutions adds efficiency to your day-to-day workflows.

1

Research Tools

30+ asset class ratings. You receive access to the full library of data-driven research to support portfolio decisions.

2

Model Portfolios

The model portfolios free up your time, improve ongoing risk management, reduce overhead costs, and enhance your firm's platform through expanded research and investment capabilities

3

Client Insights

You receive white label materials to communicate key insights to current and prospective clients.

Institutional Data-Driven Resources for Financial Advisors

Increase your asset allocation conviction with institutional resources and portfolio tools. MarketDesk's quantitative approach helps guide your firm's portfolio decisions.



Market Talking Points
As of March 2, 2022

Current U.S. Market Outlook
Have been **cautious** (2 months) - Markets are off to a volatile start in 2022, and geopolitical tensions are exacerbating the volatility. Equity markets are expected to see some recovery in the short term, but a Fed hike event, which is expected to occur later in the year, will add to the volatility. The 10-year yield is at 2.85%, suggesting rates could rise later during 2022. The next 12-18 months will provide plenty of investment opportunities and will be a source for the remainder of 2022.

Long-Term Outlook (12 months) - Markets were able to look through Covid inflation, and Fed tightening during 2021, but we expect 2022 to be more challenging. The Fed's move to raise rates, and the threat of potential inflation could cause the Fed to tighten more. On top of this, market volatility could increase the volatility of equity returns, and lower equity returns. We anticipate a year of market volatility and suggest investors to take a diversified approach to equity returns, and to consider a more active approach to equity returns, later in the year page of the 1022 EA Report, for our more active strategy describing 2022.

Current Market Themes
Federal Reserve Policy - Fed expected to raise interest rates of market. Expected number of 2022 rate hikes depending on inflation.
Cost of Inflation - Cost of inflation is increasing in various forms. Fed's actions could help to curb inflation.
Inflation Pressures - Geopolitical tensions & Russian sanctions likely to keep inflation elevated near term (i.e., energy & food).

Economic Factors
U.S. GDP Growth - Q1 2022 GDP growth rebounded, driven by inventory restocking. Expect 2022 GDP growth to be similar to 2021.
Inflation - Long-term inflation expectations decreasing, but near-term inflation pressures (CPI) increasing.
Employment - Covid-related layoffs, tight labor market. Expect wage inflation to be lower than 2021.
Consumer Confidence - Consumers have decreased their spending on discretionary goods & services, but are increasing their spending on necessities.
Interest Rates - Fed's 2022 rate hike could lead to a 2022 rate hike. Long-term yields are lower than market & Fed's expected rate.
Real Estate - House start conditions have improved, but are still below the level that has been seen.

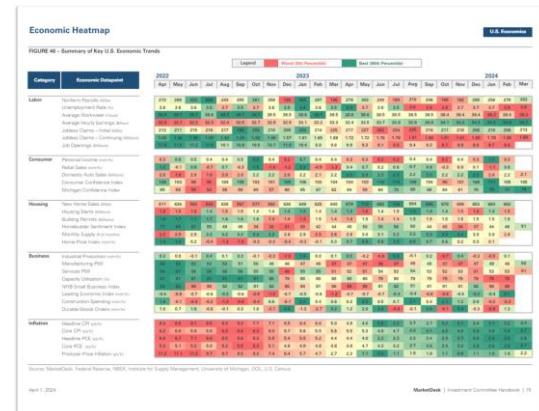
U.S. Stocks
Large Cap Growth - High inflation headlines & Fed tightening could lead to lower valuations.
Large Cap Value - Market has been trading at a premium, which could lead to a correction.
Mid Cap - Market has been trading at a premium, which could lead to a correction.
Small Caps - Market has been trading at a premium, which could lead to a correction.

International
Developed Markets - Fed tightening & 10Y strength may lead to a correction compared to the Fed tightening, 10Y strength & China's policy & economic growth.
Emerging Markets - Fed tightening & 10Y strength may lead to a correction compared to the Fed tightening, 10Y strength & China's policy & economic growth.

Bonds
Investment Grade - Lower credit risk as a result of Fed tightening. Fed tightening 2022 supports higher rates.
High Yield - Higher duration in CDOs is more beneficial, but wider credit spreads could lead to a correction.

MarketDesk | Outbound COO Resource

Market Talking Points
[Download Sample](#)



Economic Heatmap
FIGURE 04 - Summary of Key U.S. Economic Trends

Category	Indicator	2022	2021	2020
Labor	Unemployment Rate (%)	3.9	6.2	14.3
	Change (3-Month %)	-0.1	0.1	0.1
	Average Hourly Earnings (MoM %)	0.3	0.4	0.1
	Jobless Duration (Weeks)	18.2	17.8	17.5
	Jobless Duration (MoM %)	0.1	0.1	0.1
Consumer	Personal Consumption Expenditures (MoM %)	0.4	0.4	0.1
	Consumer Spending (MoM %)	0.4	0.4	0.1
	Consumer Confidence Index	100.3	100.3	100.3
	Consumer Sentiment Index	100.3	100.3	100.3
	Consumer Expenditure on Services (MoM %)	0.4	0.4	0.1
Housing	New Home Sales (MoM %)	0.4	0.4	0.1
	Building Permits (MoM %)	0.4	0.4	0.1
	Homebuilding Starts (MoM %)	0.4	0.4	0.1
	Homebuilding Starts (YoY %)	0.4	0.4	0.1
	Homebuilding Starts (MoM %)	0.4	0.4	0.1
Business	Manufacturing Production (MoM %)	0.4	0.4	0.1
	Manufacturing Orders (MoM %)	0.4	0.4	0.1
	Non-Manufacturing Production (MoM %)	0.4	0.4	0.1
	Non-Manufacturing Orders (MoM %)	0.4	0.4	0.1
	Non-Manufacturing Production (YoY %)	0.4	0.4	0.1
Inflation	CPI (MoM %)	0.4	0.4	0.1
	CPI (YoY %)	0.4	0.4	0.1
	PPI (MoM %)	0.4	0.4	0.1
	PPI (YoY %)	0.4	0.4	0.1
	Core CPI (YoY %)	0.4	0.4	0.1

Source: FRED, Bureau of Economic Analysis, BEA, BLS, and other sources. Data as of March 2, 2022.

Investment Committee Handbook
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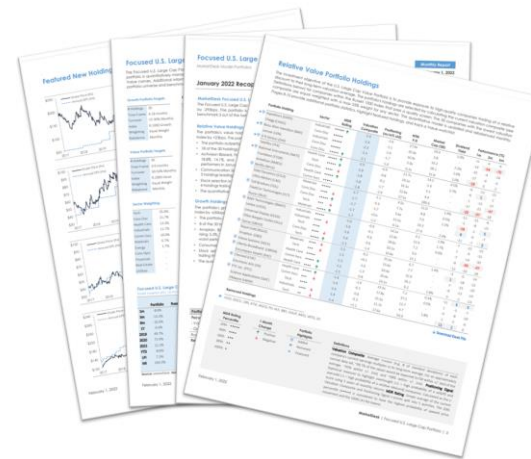
Backed by Quantitative Research Framework

Designed to deliver **better client outcomes with increased consistency**. Our investment philosophy that focuses on disciplined asset allocation and prioritizes risk-adjusted returns.



ETF Asset Allocation Models

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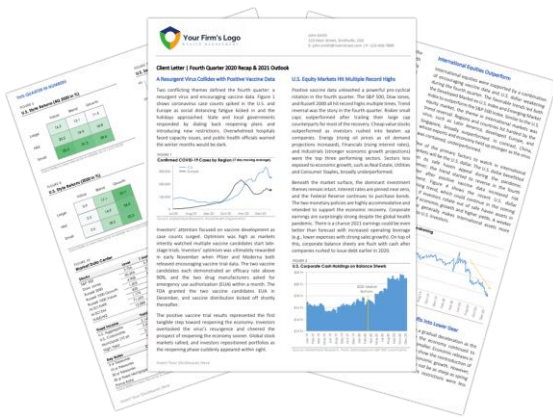
Quantitative Stock Models

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Client-Friendly Newsletters & Presentations

Save time, enhance your client experience, and grow your practice with client-friendly insights.

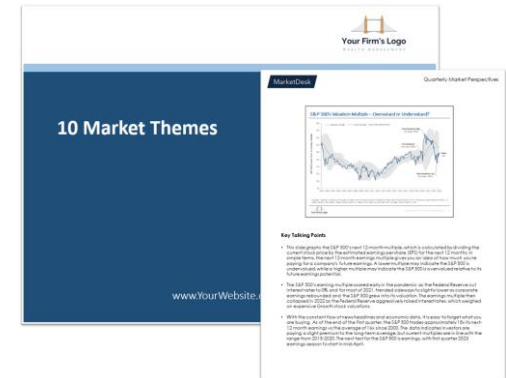
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Quarterly Client Letter
[Download Sample](#)



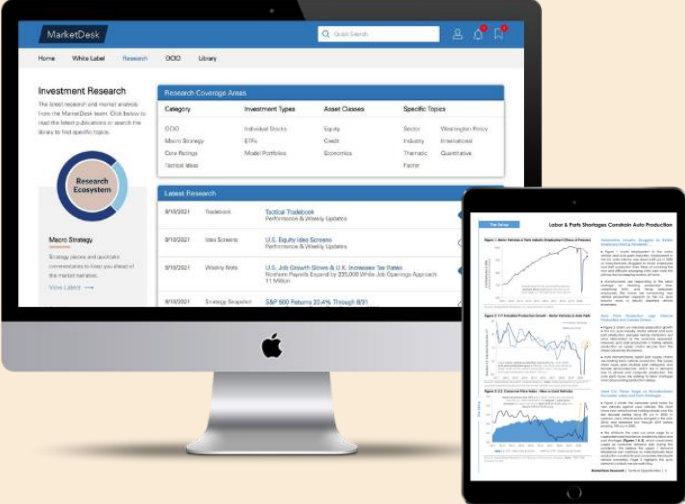
Chart of the Month
[Download Sample](#)



Quarterly Webinar
[Download Sample](#)

Free 14-Day Trial Access

See how 150+ wealth management firms are **saving time, lowering costs, and growing their firms** with MarketDesk.



Try the Platform for Free

[Click Here to Get Started](#)

Key Advisor Benefits

Save time and cost while unlocking your firm's growth. MarketDesk is a seamless extension of your team and expands your firm's resources overnight. You retain complete control and gain an independent partner **focused on your long-term success.**

- ✓ **Unlock Your Growth** – Streamline Operations & Prioritize Growth
- ✓ **Turnkey Solutions** – Upgrade Your Firm Overnight
- ✓ **0.00% AUM Fees** – The Independent Partner You've Been Looking For
- ✓ **Institutional-Grade Framework** – Robust, Repeatable Processes
- ✓ **Flat Fee Subscription** – Built Exclusively for Financial Advisors

Try it Free

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