

Bond Case Briefs

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Resilient Infrastructure Firms in Bankrupt Municipal Markets.

Summary

- Municipal bond markets face rising defaults in 2024, creating opportunities for firms with operational rigor and strategic foresight.
- Chung Ju-Yung's philosophy of frugality, execution, and partnerships drives value creation in distressed infrastructure, exemplified by Clean Harbors' success in repurposing industrial sites.
- Investors should target firms with proven distressed market expertise, strong balance sheets, and ESG-aligned partnerships to transform assets like toll roads or nursing homes into profitable ventures.
- Regulatory shifts and climate mandates will shape opportunities, with 72% of institutional investors prioritizing sustainability in distressed asset acquisitions.
- The next decade's municipal bankruptcies offer a blueprint for reinvention, rewarding firms that turn decay into growth through strategic execution and community alignment.

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