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[California Municipal Bonds: A Strategic Bet on Resilience Amid Policy-Driven Growth](#)

Aime Summary

- California's municipal bonds (rated AA by major agencies) show strong credit fundamentals amid fiscal resilience and strategic infrastructure reforms.
- Governor Newsom's Jobs First Blueprint targets 10 growth sectors with \$532M in workforce training and regional equity programs to boost long-term economic competitiveness.
- 2025 CEQA reforms accelerate urban housing development by exempting infill projects from costly environmental reviews, creating new municipal financing opportunities.
- Investors are advised to prioritize short-duration, high-rated bonds (AA/Aa+) to mitigate risks from federal tariffs and potential budget cuts while benefiting from policy-driven growth tailwinds.

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