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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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Monday, Aug 11, 2025 10:56 pm ET

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