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Municipal Finance Law Since 1971

The Growing Divide Between Markets and Households and What It Means for Municipals.

- Equities are signaling optimism while households are signaling strain. That divide matters because investors and consumers are pulling in different directions. The path of energy prices matters too.
- The municipal bond market is impacted by both. It is helping to finance the infrastructure behind the next economy, while investors are still relying on the credit strength of the current economy.
- This is why municipals still offer opportunities, but also why credit selection matters more than it did when the backdrop was easier to read, and the divide was narrower.

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