

BITESIZE

PORTFOLIO ADVISORY INSIGHTS

APRIL 2022



Rate hikes on the horizon!



Global bonds have faced a terrible start to the year. It is a challenging time for "Defensive" assets. Global central banks have started hiking rates and there are more hikes to come.

What does this mean for bonds?

Focus on investment philosophy.

What is the risk tolerance and time frames for your investors?

What asset classes can they invest in?

Are you an SAA only portfolio, or do you typically engage in active/tactical changes?

What is the role of fixed income in the portfolio?

We have helped our clients work through these and in some cases have made changes.

In others, the investment philosophy resulted in portfolios being largely unchanged.

Curated by Dr. Isaac Poole, CIMA®

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Isaac is the Global Chief Investment Officer and Portfolio Manager for **Oreana Financial Services**. With experience across investment strategy, portfolio and risk management, research and central banking in Asia, the UK and Australia, he leads the team in monitoring economic and market outlooks.

