

Q2 2024 Newsletter

Subject: [ADV] Wrapping up Q2 2024 with Doepel & Wikstrom Wealth Management

# Wrapping up Q2 2024 Doepel & Wikstrom Wealth Management

Greetings:

Believe it or not, we're more than halfway through the year. It truly has flown by! The equity markets shook off April's performance doldrum and surged through May and June. Now midway through July, we have seen new highs on the S&P 500. While the largest performance driver is Mega Tech Stocks with an emphasis on Artificial Intelligence, there has been a slight shift in Bonds and Value Stocks. Value Stocks have been lagging the overall market performance year-to-date; but on a month-to-date basis, dividend-paying equities are beginning to pick up steam. Bonds are still recovering from the cataclysmic slide in 2022, but they have started turning positive, offering attractive yields. Recent news about inflation slowly coming down suggests that the Fed may lower rates, which could benefit bond investments over time.

Looking ahead, we are anticipating an extremely contentious election battle. As a result of the political unrest, we've witnessed a horrific assassination attempt on Former President Trump. It's been over 40 years since there's been an assassination attempt on a President or Presidential Candidate. For the sake of all Americans, our sincere hope is that we can return to spirited debates as our preferred form of discourse; violence is never the answer. Our thoughts and prayers are with the family of Corey Comperatore, who lost his life during the tragic events of that day.

While we may feel divided, especially during an election year, it's imperative to maintain a level focus. Our nation has weathered many Presidents; some great, some not-so-great. Our nation has experienced periods of prosperity and drought, expansion and contraction, successes and failure. Nevertheless, the resiliency of our people carries us forward. As resilient investors, we may encounter market storms, but we are sure to navigate through them. Continue marching onward; we're here to walk with you every step of the way.

*Any opinions are those of Erin Wikstrom and not necessarily those of Raymond James. Investments mentioned may not be suitable for all investors. The S&P is an unmanaged index of 500 widely held stocks that is generally considered representative of the U.S. stock market. The information has been obtained from sources considered to be reliable, but we do not guarantee that the foregoing material is accurate or complete. Any information is not a complete summary or statement of all available data necessary for making an investment decision and does not constitute a recommendation. Expressions of opinion are as of this date and are subject to change without notice. Investing involves risk and you may incur a profit or loss regardless of strategy selected.*

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## Webinar Replay

### City of Light, Market of Opportunities

Staying informed about current economic and financial market developments is key to successful financial planning. That's why I'm sharing with you this webinar featuring Raymond James Chief Investment Officer Larry Adam, which was recorded Monday, July 8, 2024. It contains some great insights into the financial markets.

[View replay here](#)

## May was Raymond James Cares Month

A big thank you to clients, neighbors and friends who gave to our donation drive for a local food pantry!

***We volunteered as a team at Feed My Starving Children as part of our ongoing commitment to serve the community!***



*Best Regards,*

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To those of you who have referred your family, friends and business associates, we sincerely thank you.

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