Matt Sherwood: Navigating a 4% world

By Perpetual Asset Management
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In his latest report, Perpetual's Matt Sherwood offers a multi-asset outlook for global growth, The confluence of flat yield curves, elevated equity valuations, and tight credit spreads has ushered investors into a benchmark-constrained "4% World".

According to Matt Sherwood, Head of Investment Strategy - Multi Asset, the disconnect between valuations and corporate fundamentals means all investors are increasingly exposed to subdued returns and more fragile markets, and could see amplified risk for retirees grappling with heightened sequencing risk.

Matt says that while the current environment may feel unfamiliar to some, it's important to approach the terrain with curiosity and agility - adjusting strategies to ensure portfolios can achieve strong risk-adjusted returns tailored to clients' goals.

In his latest report, he offers a multi-asset perspective on navigating this world, focusing on:

- Tackling passive investment risks
- Mitigating sequencing risks
- Enhancing downside protection
- Perpetual's approach: income and downside protection focus

Download his full report

Matt Sherwood

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