Taking a punch, & getting up again

Last week, we published a missive from Evergreen's partner Louis-Vincent Gave titled "Where will the next deflationary shock come from?" In the piece, Louis discussed whether there are any lurking deflationary shocks supporting the view that that the inflation readings weâ??ve recently seen are â??transitoryâ?•. This week, we are sharing a superb presentation by Louis from John Mauldinâ??s 2021 Strategic Investment Conference (SIC). During the presentation, Louis goes even deeper on the very relevant topic of inflation. We've included both a recording of the presentation and a slide deck below. Please enjoy!

<u>View Presentation as PDF</u> <u>Listen to Recording on Spotify</u>