

What Really Matters?

By Howard Marks

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There are few figures in our industry that I consider “can’t miss” contributors in terms of financial commentary. Howard Marks of Oaktree is one of them. His vast knowledge of the economy, public markets, private markets, etc., is tremendous. Unlike most authors, he doesn’t seek to impress people with complexities and big words. Instead, like most brilliant authors, he takes complicated topics and untangles them into understandable terms. Beyond his style of communication, I also happen to think that his philosophy and approach to investing is quite brilliant. His firm and career track record would seem to support these sentiments. Attached are both a written version as well as an audio recording from Howard. It’s a bit of a longer read which is why we included both formats. I hope you enjoy this week’s edition.

Listen Here: [Behind the Memo: What Really Matters?](#)

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