



THE JOSEPH GROUP
CAPITAL MANAGEMENT

PORTFOLIOS at YOUR PLACE

Predictions Are for Show; Portfolio Changes Are for Dough

This time of the year, we love to quote the founder of The Leuthold Group, Steve Leuthold in saying, “predictions are for show; portfolio changes are for dough.” At January’s Portfolios at Your Place, we will look at “5 & 5 for 2025.”

We will look back at five themes from the past and five themes for the future, all of which are relevant today. These aren’t predictions or forecasts, but instead are key areas of focus which we believe will drive markets and returns in 2025.

WEDNESDAY
JANUARY 15, 2025
4PM

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