

# Macro Market Strategy Project

Author: Arshia Verma

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## Overview:

This self-led project explores how inflation and interest rate cycles from 2020 to 2025 influenced U.S. equities and bond markets. Using synthetic Excel data, I analyzed monthly S&P 500 trends, Treasury yield movements, and their correlation. I proposed a barbell investment strategy favoring defensive equity sectors and longer-duration bonds. This was undertaken as part of my personal learning and passion for understanding macroeconomics and financial markets.

## Key Insights:

- Moderate inverse correlation between 10Y Treasury yields and S&P 500 returns.
- Equity returns compressed during Fed rate hikes, particularly from 2022 to 2024.
- Defensive sectors and long-duration bonds are more resilient in high-rate environments.

## Deliverables:

- Excel Dataset (2020-2025 S&P 500, 10Y Treasury Yield, Monthly Returns)
- PowerPoint Visuals: Yield vs Equity Chart and Monthly Return Bar Chart
- Summary PDF Report

## Next Steps:

I am open to conversations around macro strategy, data-driven investing, and professional opportunities in markets and finance. Feel free to connect!