

Research Content Library

Below is a catalog of recent content published by the Consulting Research group, including Synergy content, market updates, and special topics.

(All material is for internal use only.)



Synergy Content

[Q4 2022 SYNERGY Investment Group Panel](#)

Mike Vogelzang is joined by the leaders of the Investment Group to review 2022 market and discretionary portfolio performance, discuss our 2023 market outlook, and share best practices for client conversations.

[Q4 2022 Discretionary Strategies Overview](#)

Jim Underwood provides an overview of portfolio positioning, performance, and attribution for our discretionary portfolios.



Market Updates

Investment Committee House Views

The latest version of the Investment Committee "House Views" summary, dated April 1, 2023.

PDF version: [House 4.1.2023](#)

[Q1 2023 Investment Strategy: Investors in Limbo as Fed and Markets Clash](#)

Sam Kirby provides a recap of the quarter and a summary of our forward outlook.

[CAPTRUST Market Update Video – April 2023](#)

Mike Vogelzang provides an update on current market conditions and our outlook.



Special Topics

[Capital Market Assumptions - September 2022](#)

Nick Walding provides a detailed overview of our latest Capital Market Assumptions, including methodology and changes vs. our prior assumptions.

[Investment Committee House Views Dashboard](#)

Sam Kirby and Zach Hancock introduce a new interactive dashboard to learn more about our House Views and how portfolio positioning has changed over time.

[Investment Policy Monitoring Methodology - Overview](#)

Kevin Fieldman provides a brief introduction to the CAPTRUST Investment Policy Monitoring methodology.

[Individual Securities Management Group Overview](#)

Christian Ledoux provides a brief introduction to our ISM team, capabilities, and portfolios.