MBL ADVISORS

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Investment Strategy Outlook

August 2026

Partially hidden among numerous other more complex topics, the core of virtually every financial analysis curriculum is the principle that earnings and interest rates are the two primary drivers of stock prices over longer time horizons. Earnings growth has been spectacular over the last several quarters, and although the growth rate is likely in the process of peaking, corporate profitability is expected to remain robust in the quarters ahead. In this sense, the market has prioritized the most important variable despite the plentiful headline risks throughout the course of this year.

In this Investment Strategy Outlook, we cover corporate earnings strength, valuations, the AI infrastructure buildout and its financing, the shifting Fed and interest rate backdrop, and the implications for financial markets looking ahead.

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Summer History Series: Part II

Retirement in America

How We Got Here and What It Means Today

Our second installment traces retirement in America from its roots in Roman military through the rise and fall of the employer-funded pension, the creation of Social Security in 1935, and the 401(k) revolution that shifted responsibility for retirement savings onto individual workers. It closes with a look at where things stand today, including the growing divide in how Americans fund retirement and why financial independence may be a more useful frame than a fixed retirement date. Follow the link below to read more.

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Trump Accounts

Trump Accounts are a new federal savings vehicle created to help build long-term wealth for American children. In this article, we break down how the accounts work, including eligibility, contribution limits, gift tax treatment, and where they may fit alongside 529 plans and other family gifting strategies.

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