
Carlsquare weekly letter: Sell in May and stay away?

Oil is falling back again, making way for lower interest rates and a new leg up for the stock market. This is in line with our plan – is it time to buy or cut back?

We take a step back and remind everyone of the importance of taking a holistic view of portfolios. Inflation or no inflation is the big question right now and to hedge against inflation, commodities are an alternative hedge.

[Read the weekly market letter here](#)

About Carlsquare

Carlsquare is a global research firm and financial advisor, focusing on M&A, Equity Research and Growth Equity. Carlsquare has 150 employees with deep sector knowledge in all 11 GICS sectors. The senior equity research team has extensive experience about the stock environment and several business sectors. The team produces company research reports, independent valuations and trading notes. The group have offices in Canada, Denmark, France, Germany, Poland, Sweden, United Kingdom and United States. [Read more](#)

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Attachments

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