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U.S. Equities: 2014 Outlook

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March 21, 2014

With this in mind, De Clue recommends paying attention to international equities in both developed and emerging markets, including:

- **Europe:** "Europe is now slowly coming out of recession with light at the end of the tunnel, which may bode well for U.S. companies that have a significant presence in Europe," he says.
- **Japan:** "In Japan, you have a very interesting experiment to break a decades-long cycle of deflation and kick-start sentiment to get people to save less and buy more," he says. "Although you could argue this is helpful to Japanese companies competing against U.S. companies, having the world's third largest economy on a better growth trajectory may be good for all."
- **China:** "When China is successful at shifting its economy from being investment-driven to being consumer-driven, look out," he says. "There may be an insatiable appetite for a ton of different consumer products, and it may be up to U.S. companies to compete effectively in that market."

Remember that international investing involves special risks, including foreign taxation, currency risks, risks associated with possible differences in financial standards and risks associated with

future political and economic developments.

Investing in emerging markets may involve greater risks than investing in more developed economies. In addition, concentration of investments in a single region may result in greater volatility.

For U.S. companies with an international footprint, economic growth in these and other markets may increase global earnings potential. "It's a wild card that could provide some upside to U.S. equities in 2014," Sandven says.

Should You Invest?

Should you abandon U.S. equities in 2014, or double down on them? The best answer will be based on your unique goals, time horizon and personal situation — and may be somewhere in between. "From an asset allocation perspective, we continue to believe that equities are a key component of prudent portfolio management," Sandven says. "As we look to the future, U.S. equities are still likely to trend higher but at a more moderate pace."

Watch Sandven discuss in more detail the forecast for U.S. equities and reflect on 2013 equity performance.

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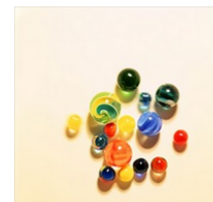
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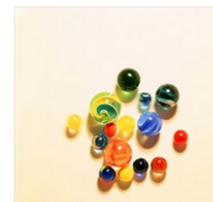
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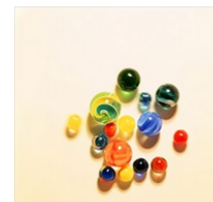
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