



Happy New Year! As we bid farewell to 2023 and embrace the possibilities of the year ahead, many of us embark on the tradition of setting New Year's resolutions. It's a time-honored practice where we reflect on our lives and envision a better version of ourselves. However, we often find that despite our best intentions, these resolutions can be challenging to execute and maintain throughout the year.

We believe it's essential to acknowledge these challenges and offer insights and strategies to help you stay committed to your goals. Let us help you get started :

- 1. Set realistic expectations.
- 2. Combat procrastination by visualizing the end goal.
- 3. Build new habits.
- 4. Progress is not linear, and setbacks are a natural part of the journey.
- 5. Celebrate your progress along the way.

Happy New Year!
Michelle

Spotlight

You've got goals and we are here to help you achieve them. If you aren't too sure of what to set as your New Year's resolutions we've got a few listed below! Let's make this our best year yet!



Resolutions

- ☐ DISCUSS STRATEGIES TO MINIMIZE TAX LIABILITIES
- ☐ EXPLORE IMPACT INVESTING AND PHILANTHROPY
- ☐ MAP OUT LEGACY PROJECTS
- ☐ STRIVE FOR HIGHER WORK/LIFE BALANCE
- ☐ OPTIMIZE PORTFOLIO AGAINST INFLATION RISKS



In the meantime, check out the top gadgets of 2024, which one are you most excited for?

Predicted Top 2024 Gadgets

Articles



U.S. STOCK MARKET WINNERS AND LOSERS OF 2023



In 2023, the U.S. stock market saw surprisingly strong returns, even as interest rates climbed higher. The S&P 500 rose over 24% amid exuberance around AI and big tech.

WINNERS



TECHNOLOGY

Tech stocks scored solid investor enthusiasm for AI. Nvidia posted a record \$18.1B in third quarter revenue, driven by demand for AI chips.

BIG WINNER: 



COMMUNICATION SERVICES

Meta was the second best performing stock in the S&P 500. In its "year of efficiency" the company fired 10,000 employees following a wave of layoffs in late 2022.

BIG WINNER: 



TRAVEL SERVICES

The consumer discretionary sector had one of its best years on record. Royal Caribbean was a top performer as travel demand hit all time highs.

BIG WINNER: 



ASSET MANAGEMENT

The world's largest alternative asset manager, Blackstone, saw returns of over 63%. The company joined the S&P 500 in September 2023.

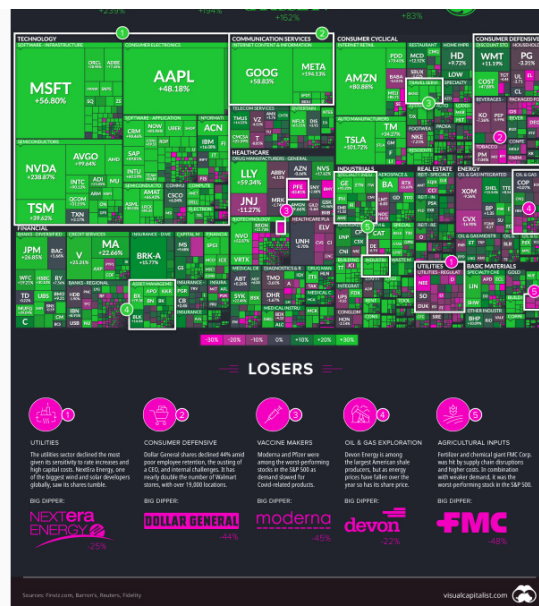
BIG WINNER: 



INDUSTRIAL SUBSECTORS

General Electric shares skyrocketed in 2023 as demand for jet engines increased. Industrial distribution companies such as Grainger and Ferguson had a successful year.

BIG WINNER: 



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