

Investment Insights - January 2025



We hope your 2025 is off to a great start. Many times, this is an opportunity to consider your goals for the new year. If you would like to discuss your objectives or have us review your retirement account allocation, please feel free to reach out to Jake@ForYourFuture.net to schedule an appointment. We are happy to meet by phone, Zoom, or in person.

Although December was a little bumpy, the year ended strong. Your retirement accounts should have reflected a good return. We have included some market insights for you to consider as we start the new year.

Financial Markets 2025: Onward and upward

Key takeaways as we leave 2024 behind and begin a new year.

- Stocks delivered exceptionally strong returns in 2024 due to a rare “Goldilocks” combination of strong earnings growth plus rising price-earnings ratios.
- 2025 may be less likely to see a repeat of this combination. Instead, stock gains may be more likely to track earnings growth (which continues to look robust).
- One key risk to watch for in the year ahead may be a re-acceleration in inflation, which could occur if the economy re-accelerates.
- Stay the course with a long-term investing strategy

Articles for more insight into the outlook for 2025:

- [What's ahead for stocks in 2025 – Fidelity](#)²
- [Long-term perspective on markets and economies – Capital Group](#)¹

Thank you again for your relationship with us, and we are looking forward to another year of serving you and your family.

Your Team at FCG



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*****Values for these investment models reflect their actual performance as reported by Axos Advisor Services as of 12/31/2024. Your specific portfolio holdings and performance may vary based on holding period, intra-year portfolio changes, deposits and withdrawals, holdings outside our models, and portfolio weighting.**

Sources:

- 1 Romo, M. (n.d). Long Term Perspective on Markets and Economies. Los Angeles; Capital Group.
- 2 Timmer, J. (2024, December 18). What's Ahead for Stocks in 2025. Smithfield; Fidelity.

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