

## VIDEO - The Consumer Conundrum: Which Stocks Make Sense Today?



**Background:** One of the biggest macro investment controversies is the state of the US consumer. Jobs data remain relatively strong, but confidence is low. The stocks exposed to the Consumer have materially lagged. Hence, we investigate the Consumer Discretionary and Consumer Staples sectors in today's research.

**Stock ideas:** [We offer long / short Consumer Staples \(Slide 24\) and Consumer Discretionary \(Slide 25\) stock ideas, based on metrics that were effective or growth themes we find are attractive long-term.](#) For any bespoke work on other trends like inventory or pricing, please don't hesitate to contact us.

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